

Case Types

Case Types

Purpose and when to use this record

Maintain the controlled incident or case classifications used for intake and reporting.

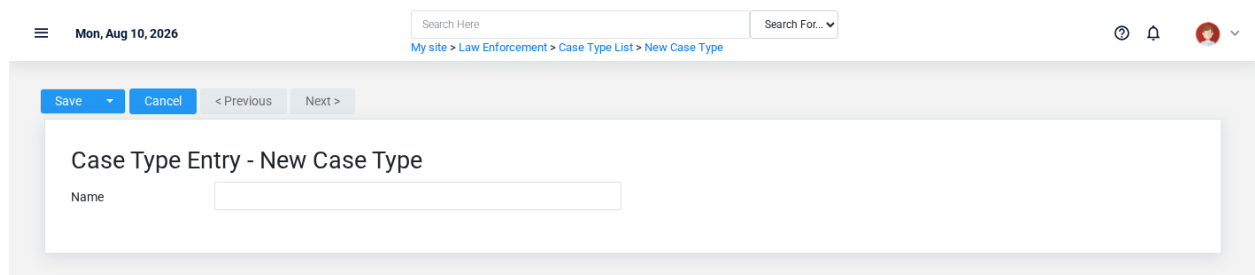
At a glance

- **Identify it by: Name.**
- **Why care:** Use the agency's approved terminology and access policy. Preserve dates, responsible personnel, case links, and audit history because these records may support official reporting or custody review.

Before you begin

You need the Brisk permission for the action you are taking on case types. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Create a Case Type



The screenshot shows a web application interface for creating a new case type. At the top, there is a navigation bar with a hamburger menu, the date 'Mon, Aug 10, 2026', a search bar with 'Search Here' and 'Search For...' dropdowns, and a user profile icon. Below the navigation bar is a breadcrumb trail: 'My site > Law Enforcement > Case Type List > New Case Type'. The main content area is a form titled 'Case Type Entry - New Case Type'. It features a 'Save' button with a dropdown arrow, a 'Cancel' button, and two buttons labeled '< Previous' and 'Next >'. Below these buttons is a text input field labeled 'Name'.

The Case Types create screen in the Brisk documentation demo.

Create a Case Type only when the existing choices do not represent the policy or classification you need. Near-duplicate setup values split reporting and make later selection harder.

1. Select the business context first.
2. Enter the required identifying and operational values: **Name**.
3. Review the identifying information shown on the screen against the source document or approved setup decision.
4. Save the Case Type, then confirm **Name** on its detail page before continuing.

After saving: Open **Cases** and confirm the Case Type appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Delete a Case Type

Delete this Case Type only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

Before confirming, check for related **Cases**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**. After confirmation, return to the Case Types list and make sure only the intended Case Type was removed.

Review Case Type details

Use the detail page as the shared record of what this Case Type currently means. Verify **Name** before relying on it for a decision.

Compare the Case Type with its source document or approved setup request before deciding that it needs correction.

Next check: Open **Cases** and confirm the Case Type appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

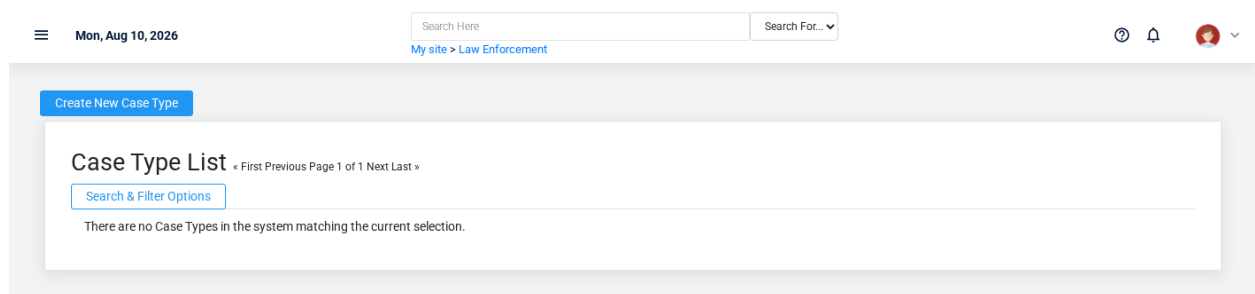
Edit an existing Case Type

Edit this Case Type when the underlying policy or classification changed. First determine whether historical transactions should retain the old value; if so, deactivate the old choice and create a new one.

1. Open the detail page. Compare **Name** with the supporting document or approved request.
2. Recheck the identifying information shown on the screen. These values are most likely to change case history, custody, dispatch, official reporting, or audit review.
3. Save the change, return to the list, and confirm that the Case Type now appears under the expected **Name**.

After the change: Open **Cases** and confirm the Case Type appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Find and review case types



The Case Types list screen in the Brisk documentation demo.

Use the Case Types list to find the correct record before opening or changing it. Compare **Name**. Compare the full identifier rather than relying on a similar name.

Open the Case Type whose **Name** match the task. If it is missing, clear the list filters and recheck the identifying information shown on the screen rather than creating a replacement immediately.

Fields and business rules

Brisk stores 1 user-relevant fields for this Case Type, including 0 linked-record selections and 0 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Name	Yes	Sets the name of this case type.

What happens next

Open **Cases** and confirm the Case Type appears with the intended label and availability. Keep the old value for historical records when changing it would split or relabel prior reporting.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Name** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The values look right but the result is wrong:** Compare this Case Type with the source document or approved setup decision, then check the downstream screen where it is used.

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