Activity Management
Frequently asked questions | September 2023

Contents

1. Can I filter by status within activity management?

Yes, you can click on the status you would like to view to quickly filter. You will be able to view all status within the activity management page.
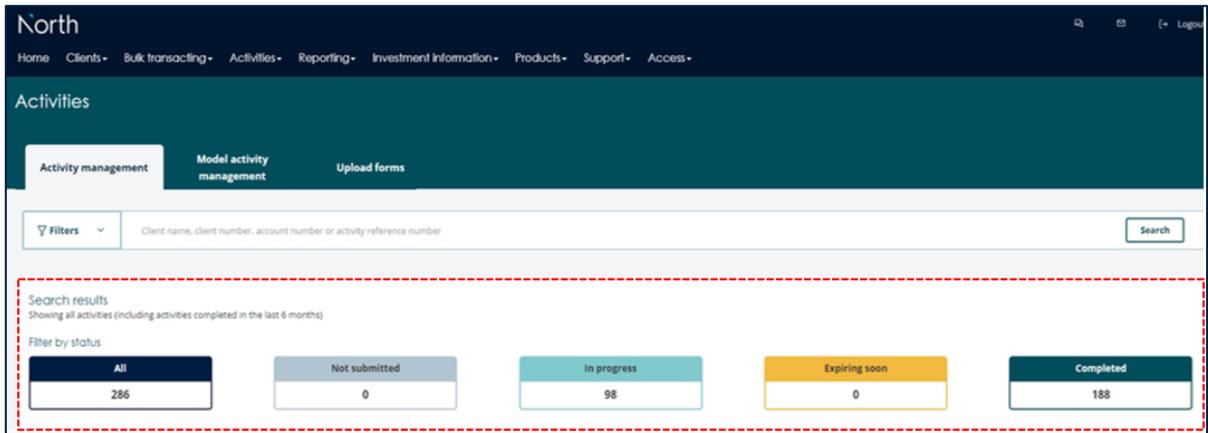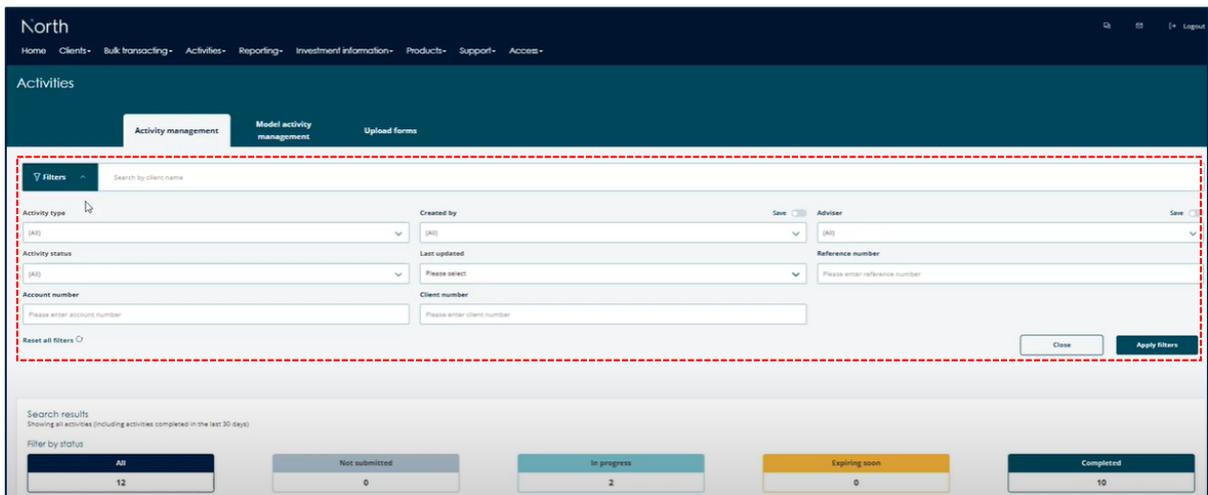

## 2. Is there an advanced filter/search function available?

Yes, you can apply an advanced filter by status, activity type, last updated, created by and adviser. Or search by client name, client number, account number or reference number.


3. How do I easily view the status of a case within the activity management screen?

You can hover over the progress bar and a pop up box will appear showing the activity status.
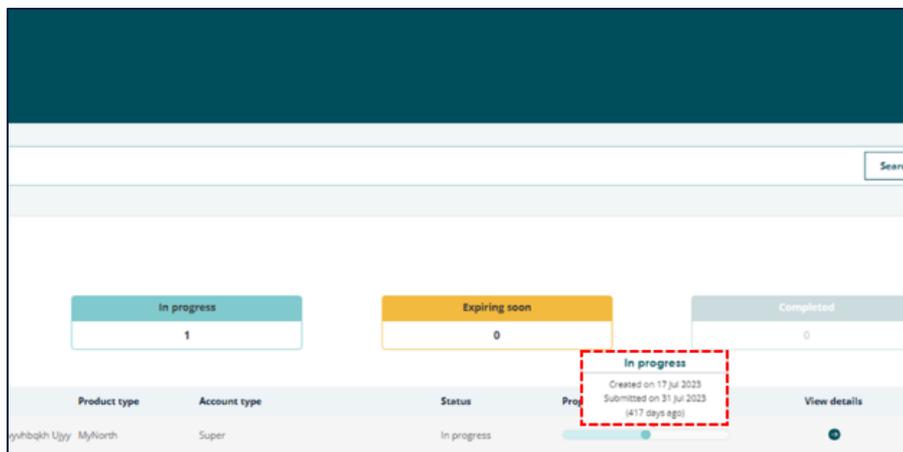
4. How do I stay up to date with the end-to-end status of a case?

You will be able to access the activity status of each activity, including, status, key dates, and a progress bar providing detailed end to end progress of an activity's lifecycle. Providing a transparent view of the status of the case.
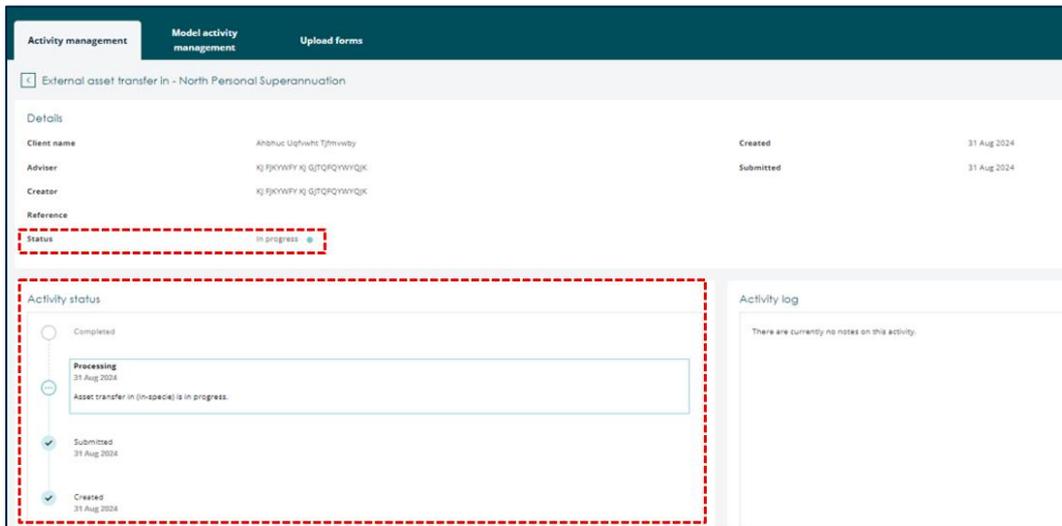
5. How are activity status details displayed in Activity Details?

A status field in Activity Management will be populated. Dot to the right of Status field will indicate the activity status/progress.
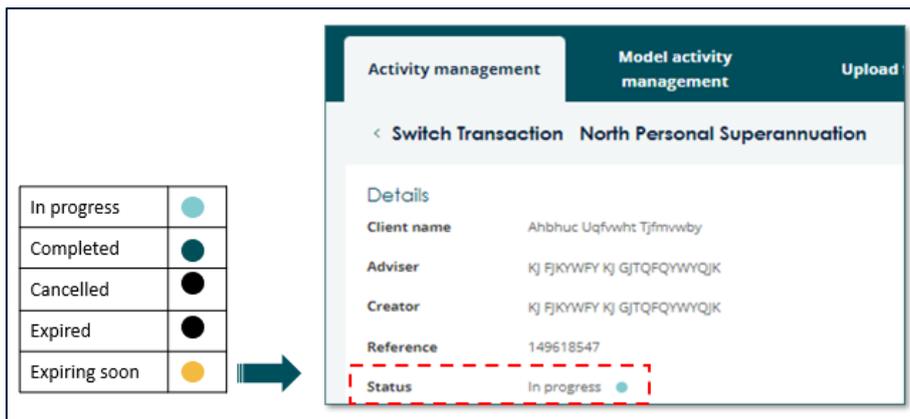
6. What are the different progress steps in the activity status?

7. Can I see notes as part of the activity status?
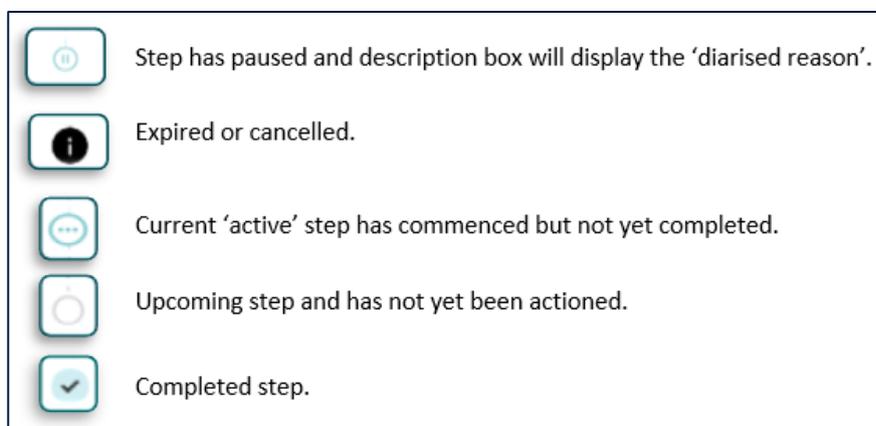
Yes, all notes present on an activity will be visible within the Activity Log section of the activities details. Step by step descriptions will also be available within the Activity Status progress bar.

8. When a request has been created but not submitted, how long until it expires?

A request that has been in Save To Resume state (Not Submitted) for more than 90 calendar days will automatically expire, i.e., expires at the end of the 90th calendar day. These requests will appear in the Expiring Soon filter 2 weeks before the 90th calendar day. These will be displayed in both the Not Submitted and Expiring Soon filters.

9. What happens when a case is expired?

If an activity has been in Save To Resume state for more than 90 days, it will expire and close. You will need to create and submit a new activity.

10. Can I re-activate a case?

Save to resume activities can be closed by you or automatically expires after 90 days. If a case needs to be re-activated, you will need to call North Service Centre to request for the case to be re-opened. However, if deemed that the case needs to be submitted, then you will need to create a new activity.

11. What support material is available for advisers?

A short video on activity management is available on North Online > Support > Training videos.

12. Need more information?

Please reach out to your Business Development Manager.

Activity Management
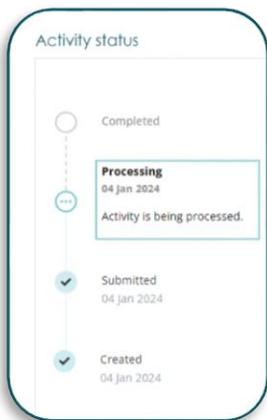*Enhancing transparency with a new progress bar – activity status feature*

A **new Activity Status section** will display more information on the status and progress of service requests by showing a visual representation of the end-to-end process steps for each request and the progression to completion.

Every step will be time stamped and will have a custom description to further enrich the information visible to users.
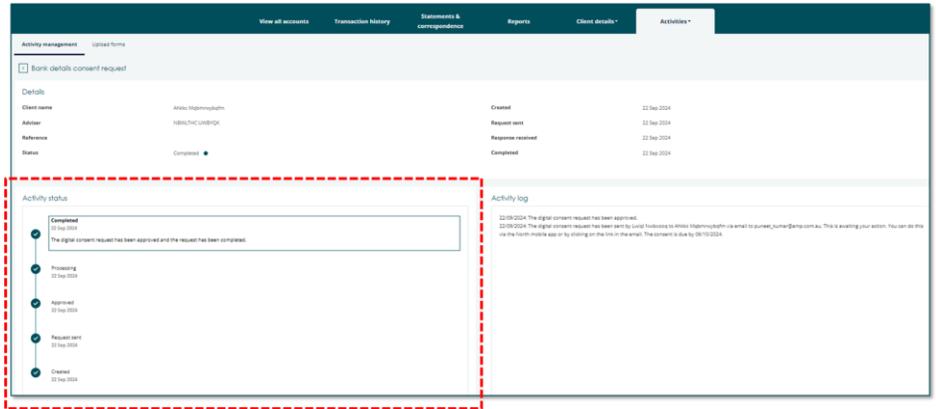
Activity status - progress steps

| Initiated online	System initiated	Initiated manually	Digital consent
Adviser/support staff or client initiated the activity in North Online	North system initiated the activity	NSC manually initiated the activity	Digital consent request activity was initiated by an adviser/support staff
Step 4 – Completed Step 3 – Processing Step 2 – Submitted Step 1 – Created	Step 3 – Completed Step 2 – Processing Step 1 – Created	Step 4 – Completed Step 3 – Processing Step 2 – Assigned Step 1 – Created	Step 5 – Completed Step 4 – Processing Step 3 – Response received Step 2 – Request sent Step 1 – Created

Step has paused and description box will display the 'diarised reason'.

Expired or cancelled.

Current 'active' step has commenced but not yet completed.

Upcoming step and has not yet been actioned.

Completed step.

Progress bar

Advisers can hover over the progress bar and a hover box displays the high-level status (e.g., not submitted, in progress, complete, expired and cancelled) and date information (when a case was created, submitted, completed, cancelled, or expired).
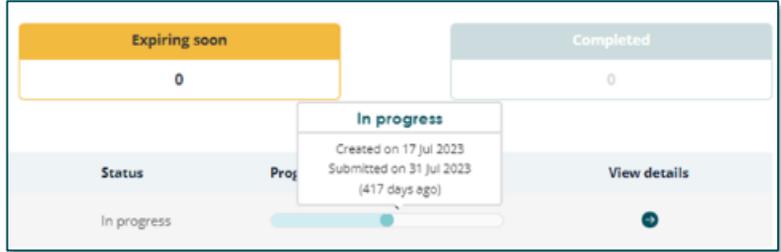
	Created
	Submitted
	Processing
	Completed
	Expired / Cancelled
	Assigned (manually initiated cases only)
	Completed (Approved) / Completed (Declined) for digital consent request cases
	Expired / Cancelled for digital consent request cases

Status field will have the coloured dot to the right of the field to indicate one of the following statuses:

In progress	🟢
Completed	🟢
Cancelled	⚫
Expired	⚫
Expiring soon	🟡
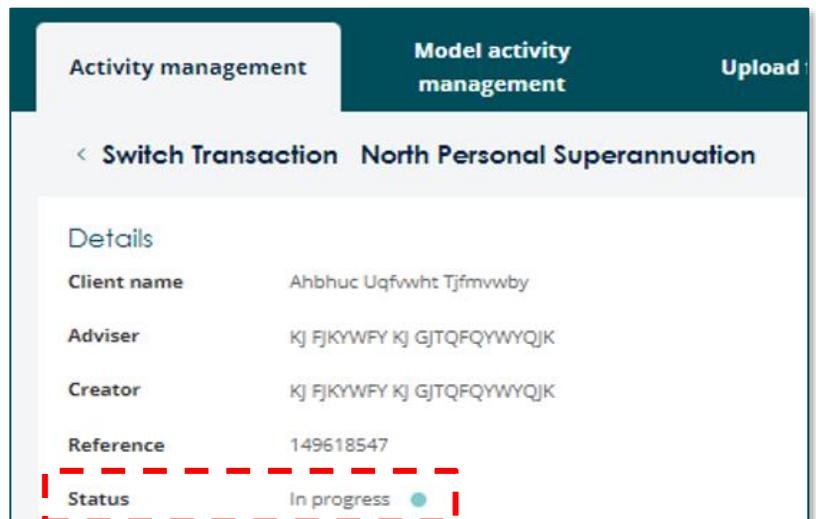
ℹ️ If the case is 'In progress' when the case is 'Expiring soon', then 'Expiring soon' will be displayed.