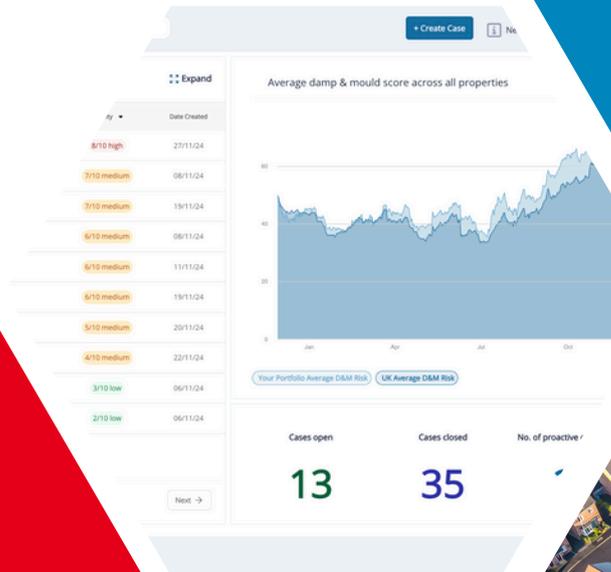




CASE MANAGEMENT HOW TO GUIDE



Contents

Section 1: Case Overview **2**

How to Navigate

- Case List
- Task List
- Average Damp & Mould Score Graph
- Quick Statistics

Section 2: Create a Case **5**

Where to find the Create a Case button

How to Create a Case

Case Priority Score & Risk Assessment

Section 3: Case View **9**

How to Navigate

- Property Details
- Case Timeline
- Tasks
- Priority Score
- Case Status
- Insight Scores
- Resident Engagement

Section 4: Analysis View **15**

How to navigate the Analysis View and the Graphs:

- D&M Insight Risk Score
- Temperature, Humidity & CO2
- Temperature, Humidity and D&M Insight Risk Scores
- D&M Risk Components

Section 5: Support **19**

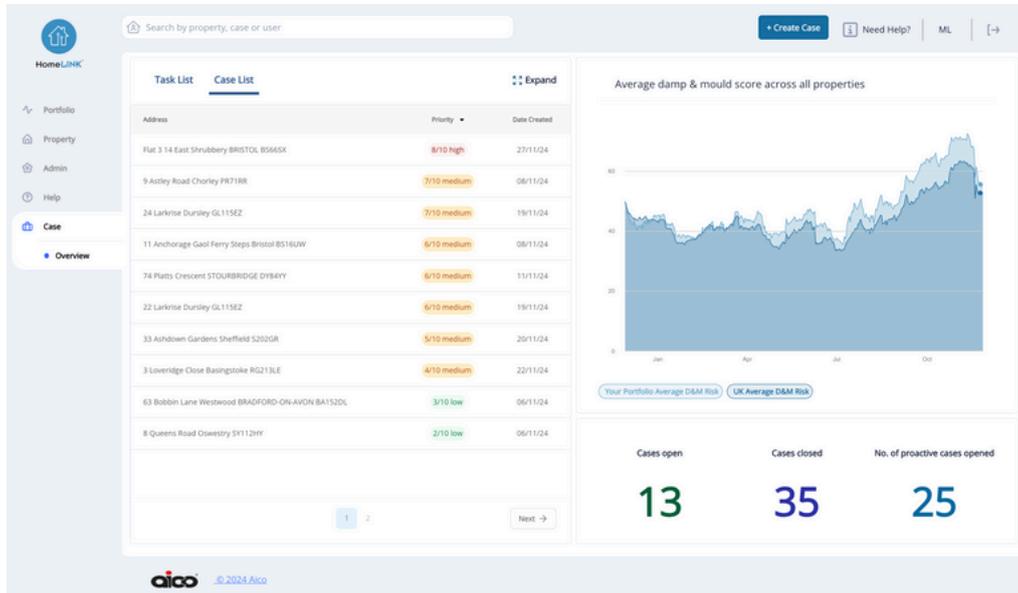
Knowledge Base Access

Technical Support

Customer Success Support

Section 1: Case Overview

As a whole view:



1a. What you can find here

The Case Overview is where you will find your Case List, Task List, Quick Stats & The Average Damp & Mould Graph - comparing your stock against the UK.

1b. How to Navigate the Case Overview

Case List:

You can expand the case list, using the “Expand”/”Minimise” Button. Making it easy to view the Address, Priority, Damp & Mould Risk Score, Date Opened & who the Case is Assigned too. You can also click on the Case in the Actions column which will take you straight to the Analysis View.

You can use the toggle on the top of the screen to switch to viewing your Closed Cases.

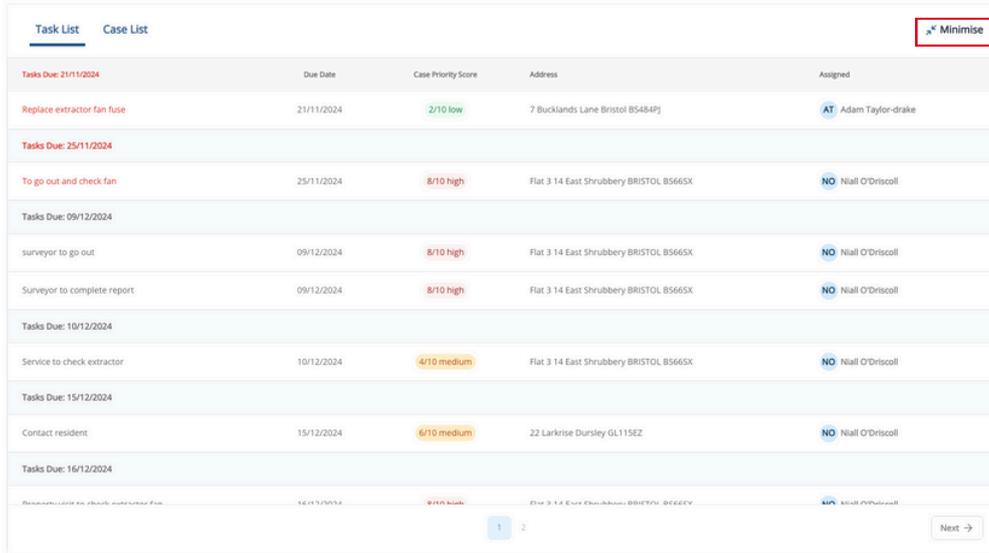
Address	Priority	Damp and Mould Risk	Date Created	Assigned	Actions
19 Grove Gardens Market Drayton TF91HQ	10/10 high	N/a	27/02/25	TF Test Account Four	🔍 📄
5 Knoll Court Knoll Hill Bristol BS91QK	10/10 high	Pending	24/02/25	NO Niall O'Driscoll	🔍 📄
90 Broomhouse Crescent Uddingston GLASSGOW G717RE	10/10 high	97.5	06/03/25	RV Russell Virtue	🔍 📄
100c Bristol Business Park Bristol BS161EJ	9/10 high	N/a	25/02/25	NO Niall O'Driscoll	🔍 📄
168 High Street Bristol BS309TA	9/10 high	Pending	09/12/24	RC Ryan Conway	🔍 📄
59a Pendock Road Bristol BS162PW	9/10 high	22.1	06/03/25	NO Niall O'Driscoll	🔍 📄
14 Bevan Road Bitton BRISTOL BS306AE	8/10 high	Pending	17/01/25	NS Natalie Sideick	🔍 📄
3 Bluegown Avenue Leybourne, WEST MALLING ME195FN	8/10 high	Pending	26/02/25	BW Bradley Wain	🔍 📄
2 Linden Grange, Clarendon Avenue BRISTOL BS78B	8/10 high	96.7	14/02/25	NO Niall O'Driscoll	🔍 📄
Cress Edge House Cress Edge House Marsh Lane Salisbury SP54UJ	8/10 high	N/a	12/02/25	NS Natalie Sideick	🔍 📄

1b. How to Navigate the Case Overview

Task List:

You can expand the Task List, using the “Expand”/”Minimise” Button. Making it easy to view the Task Title, Due Date, Case Priority Score, Address & who the Task is Assigned too.

Tasks will be in chronological order and if a Task becomes overdue it will turn Red.



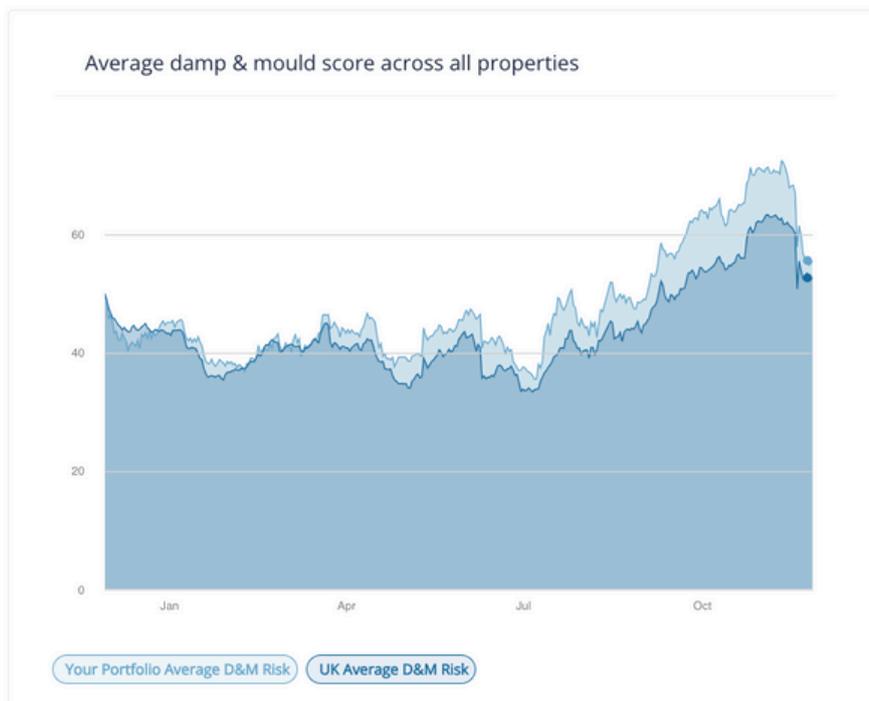
Task Title	Due Date	Case Priority Score	Address	Assigned
Tasks Due: 21/11/2024				
Replace extractor fan fuse	21/11/2024	2/10 low	7 Bucklands Lane Bristol BS484PJ	AT Adam Taylor-drake
Tasks Due: 25/11/2024				
To go out and check fan	25/11/2024	8/10 high	Flat 3 14 East Shrubbery BRISTOL BS665X	NO Niall O'Driscoll
Tasks Due: 09/12/2024				
surveyor to go out	09/12/2024	8/10 high	Flat 3 14 East Shrubbery BRISTOL BS665X	NO Niall O'Driscoll
Surveyor to complete report	09/12/2024	8/10 high	Flat 3 14 East Shrubbery BRISTOL BS665X	NO Niall O'Driscoll
Tasks Due: 10/12/2024				
Service to check extractor	10/12/2024	4/10 medium	Flat 3 14 East Shrubbery BRISTOL BS665X	NO Niall O'Driscoll
Tasks Due: 15/12/2024				
Contact resident	15/12/2024	6/10 medium	22 Larkrise Dursley GL115EZ	NO Niall O'Driscoll
Tasks Due: 16/12/2024				
Service to check extractor fan	16/12/2024	8/10 high	Flat 3 14 East Shrubbery BRISTOL BS665X	NO Niall O'Driscoll

Average Damp & Mould Scores Across Properties:

On this graph you will find Average Damp & Mould Risk Scores. This comes from our Damp & Mould Insight, utilising the growing number of Environmental Sensors installed across the UK.

Your Portfolio Average D&M Risk: This is the average score across your Connected Homes.

UK Average D&M Risk: This is the average score across the UK's connected homes.



1b. How to Navigate the Case Overview

Quick Stats:

Cases Open: This shows how many cases you have open.

Cases Closed: This shows how many cases have been closed.

Number of Proactive Cases Opened: This shows how many cases have been opened if the Landlord Identified mould before a resident reported it, for example during an annual gas safety check.



Section 2: Create a Case

The screenshot shows the HomeLINK dashboard. At the top right, a red box highlights the '+ Create Case' button. Below it is a search bar and 'Need Help?' link. The main content area is divided into two sections. On the left is a 'Task List' and 'Case List' table with columns for Address, Priority, and Date Created. On the right is a line graph titled 'Average damp & mould score across all properties' showing scores from Jan to Oct. Below the graph are two buttons: 'Your Portfolio Average D&M Risk' and 'UK Average D&M Risk'. At the bottom right, there are three summary statistics: 'Cases open' (13), 'Cases closed' (35), and 'No. of proactive cases opened' (25). The aico logo and '© 2024 Aico' are at the bottom left.

Click Create Case. The create case button will remain on the top right of your screen no matter where you are on the portal, providing quick access at all times to create cases.

2a. Steps to Create a Case

Assigning a property:

Property already connected: Begin typing the address into the "Search for a Property" box and select the connected property you'd like to open the case against.

Property not yet on the connected: Click "add a new property" then fill in the details about the property. Once added, you will return to the main create a case screen.

The sequence of screenshots illustrates the 'Add a new property' process. The first screenshot shows the 'Create a new case' screen with 'Search for a Property' and 'Add a new property' buttons highlighted. The second screenshot shows the 'Add a new property' form with fields for Name, Address, and Country. The third screenshot shows the 'Add a new property' form with the property details filled in. A red arrow points from the second screenshot to the third.

Start Date:

Chose the start date for the case. You can also chose a date in the past.

Start Date
29/11/2024

Assigning a user:

Click the “select a user” and type the name of the person you’d like to assign to the case.

Assign User
Select a user

Why was the case opened?:

Select a reason from the 3 reasons available.

Proactive: Led by a team member via conversations with either the tenant or colleagues.

Complaint: Based on a formal complaint from the resident.

Insight-Led: Created because of the insights seen on the portal.

Why was the case opened?
Select a reason

Why was the case opened?
Proactive

Led by a team member via conversations either with the tenant or colleagues

Why was the case opened?
Complaint

Case is being created based off of formal complaints from the resident

Why was the case opened?
Insight Led

Case is being created because of insights seen on the portal

Labels:

Labels are currently still in development but are coming soon!

Labels
Select labels

Upload Files:

You can upload any relevant files when opening a case - this could be a JPG, PDF or other image file.

Upload Files

2b. Case Priority Score & Risk Assessment

Once you have completed the first part of the case, you will need to set the severity of the case and the health risk.

Case Management
Create a new case
Keep up to date with any progress on your properties

Damp and mould severity 0
Negligible: No visible damp or mould, room appears fine

Resident health risk 0
No Risk: No health or age-related vulnerabilities to mould

Priority Score
0/10
Low

Case Description
Describe the reason for creating this case, who identified the issue, and the factors influencing the priority score.

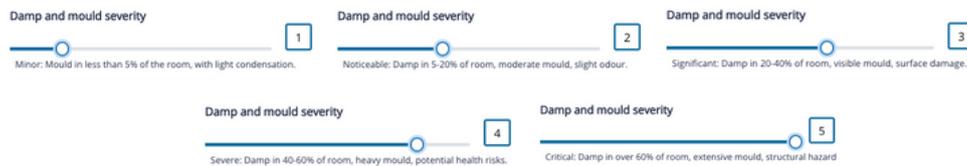
Import all existing Notes for this property into this case?
These will appear on the timeline

Back Create Case

Choosing Damp and Mould Severity:

You can choose from 5 different risk levels, dependent on the size, significance and surface damage of the mould.

The key below the toggle will support you with choosing the risk severity.



Choosing Resident Health Risk:

You can choose from 5 different risk levels, dependent on the health conditions and age of the residents.

The key below the toggle will support you with choosing the risk score.



2b. Case Priority Score & Risk Assessment

Priority Score:

Once you have completed your risk assessment, the scores will be combined to give your case an overall priority score out of 10. The case priority will be allocated as Low Priority, Medium Priority or High Priority, this will be shown under the combined score.

Scoring Brackets:

Low Priority Score: 1-3 Medium Priority Score: 4-7 High Priority Score: 8-10



Case Description & Notes:

When creating the case the final step is to add a description, this allows colleagues to understand why the case has been opened. It will also support you should you need to report on the case in the future.

At this point you can also chose to 'Import all existing notes for this property into this case', which allows you to pull through all prior portal notes for that property into the timeline on the case.

Case Description

Describe the reason for creating this case, who identified the issue, and the factors influencing the priority score.

Import [all existing Notes](#) for this property into this case?
These will appear on the timeline

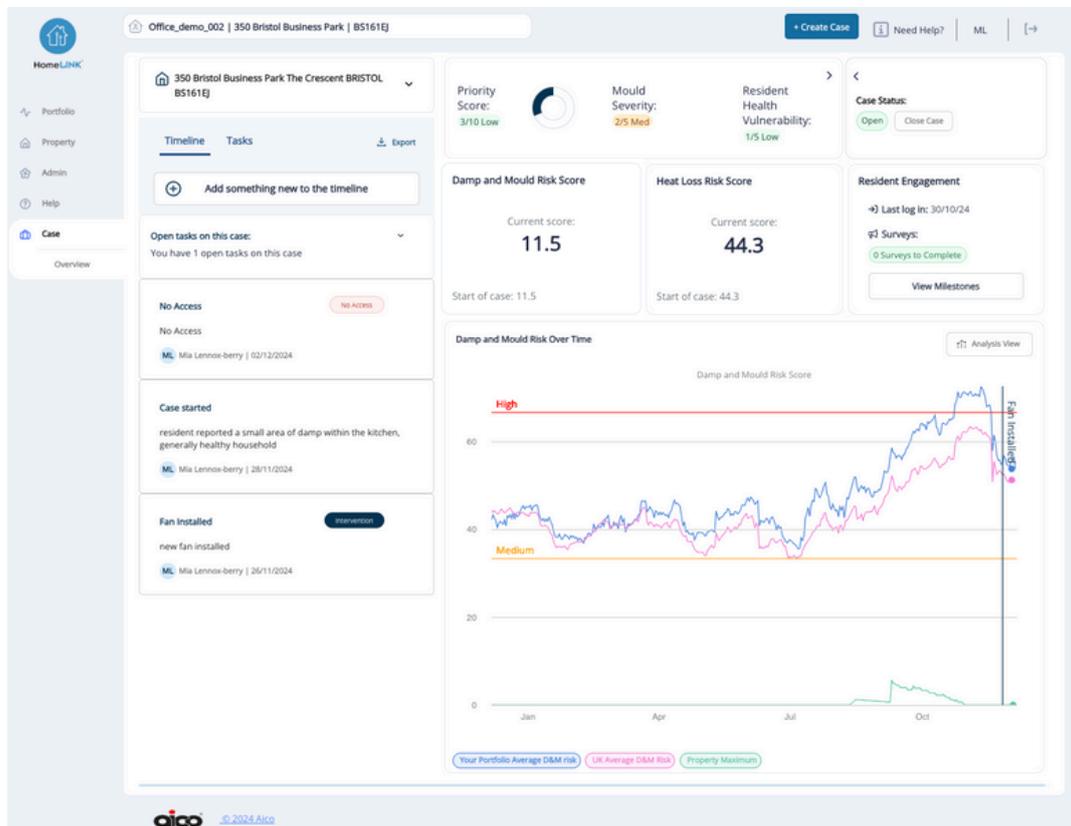
Once you have completed the required information to open a case, you can click Create Case at the bottom of the window. You will then be taken to the Case View.

Create Case

If you have missed sny details or wish to add anything further, there is a back button.

Section 3: Case View

As a whole view:



3a. What you can find here

The Case View is where you will find everything to do with your Property Details, Case Timeline, Task List, Priority Scores, Case Status, Damp & Mould Risk Score, Heat Loss Risk Score, Resident Engagement Stats and the Damp & Mould Risk Over Time Graph. In this section we will explore each of these features.

3b. How to Navigate the Case View

Property Details:

You can expand the property details on the top left of the Case View. This will give you a quick view of details regarding the building.

350 Bristol Business Park The Crescent BRISTOL BS161EJ

Dwelling Type: Commercial	Construction Type: In-situ concrete
Building Type: Commercial	Year Built: 2000
Floor: 1st Floor	Heating Type: Gas

3b. How to Navigate the Case View

Case Timeline:

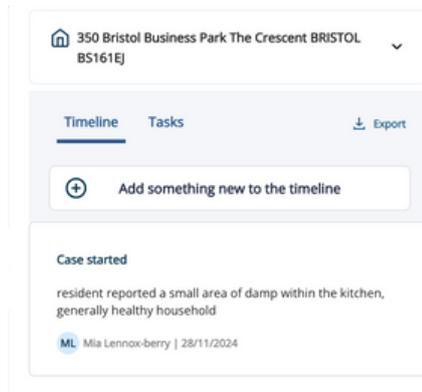
The Case Timeline is where you can build your “Golden Thread of Evidence”.

When you first open a case a Case Started entry will be added.

Everything you add to the timeline will be date stamped and will show the name of the user that added the entry.

You can add here:

- An Intervention
- A Task
- Information
- No Access

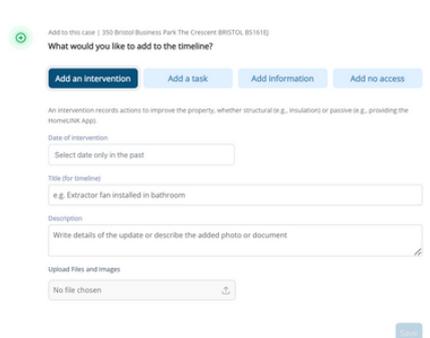


Add an Intervention:

An intervention can be added once completed. You will be asked to input the date in which the intervention happened - this can only be a historic date.

If you have a supporting photo of the intervention you can upload this and it will attach to the entry on the timeline.

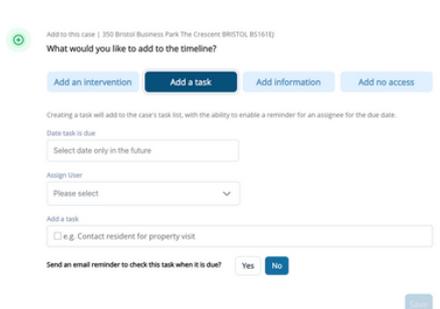
Adding interventions will allow you to track all works in one place.



Add a Task:

A task is a future action on the case or at the property.

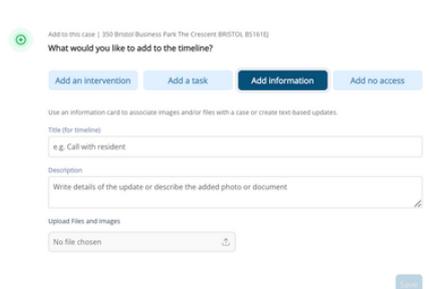
When adding a task you can assign it to yourself or another portal user - if you chose to send a reminder, this will go to the assigned user. Reminders will come via email.



Add Information:

This will allow you to add anything that may be relevant to the case.

For example, if you have a damp & mould survey and want to upload a PDF copy you can do that via Add Information.



3b. How to Navigate the Case View

Add a No Access:

Part of building your “Golden Thread of Evidence” is to record any No Access events.

It is highly advised by leading legal firms to take a photo during the event of No Access. You can add this to your entry on the timeline.

The screenshot shows a form titled "What would you like to add to the timeline?". At the top, there are four buttons: "Add an intervention", "Add a task", "Add information", and "Add no access" (which is highlighted). Below the buttons, there is a text area for "Date of No Access" with a dropdown menu set to "Select date only in the past". A larger text area for "Description" contains the text "Provide additional details regarding the lack of access to the property.". At the bottom, there is an "Upload Files and Images" section with a "No file chosen" button and an upload icon.

Case Timeline:

As you continue to add to the timeline, it will adjust to be in chronological order, ensuring that every record is clear.

The screenshot shows the case timeline for "350 Bristol Business Park The Crescent BRISTOL BS161EJ". The timeline is divided into sections: "Timeline" (selected), "Tasks", and "Export". Below the "Add something new to the timeline" button, there is a section for "Open tasks on this case" showing "You have 1 open tasks on this case". The main timeline entries are: "No Access" (dated 02/12/2024), "Case started" (dated 28/11/2024, with a description: "resident reported a small area of damp within the kitchen, generally healthy household"), and "Fan Installed" (dated 26/11/2024, with a description: "new fan installed").



Export:

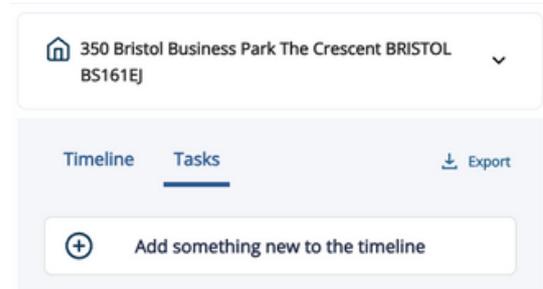
You can export the timeline at any time by simply clicking “Export”. This will export a PDF file and will include every detail from the case.

The screenshot shows the "Case Report" for "350 Bristol Business Park The Crescent BRISTOL BS161EJ". The report includes the following information: "Property: 350 Bristol Business Park The Crescent BRISTOL BS161EJ", "Case Opened: 28/11/2024 12:00 AM", and "Report Created: 06/12/2024 02:36 PM". The "Case Information" section shows "Damp & Mould" as "Open" and "8 days since the case was opened". The "resident reported a small area of damp within the kitchen, generally healthy household" is repeated. Below this, there are three summary boxes: "Mould Severity" (2/5 medium), "Resident Health and vulnerability" (1/5 low), and "Priority Score" (3/10 low). At the bottom, there are two risk score boxes: "Damp and mould risk score" (Score as of creation date: 0.0, Score at start of case: 0.0) and "Heat loss risk score" (Score as of creation date: 44.3, Score at start of case: 44.3).

3c. Case Tasks

Similar to when you are on Case Overview, you can switch from Timeline to Tasks while on the Case View.

On Tasks you can view the completed tasks against the case, tick tasks off as completed or 'add something new to the timeline' to add another task.



All tasks on this case:

Due: 16/12/2024

Check EWI install completed

Completed

Completed: 28/11/2024

Contact resident to arrange surveyor visit

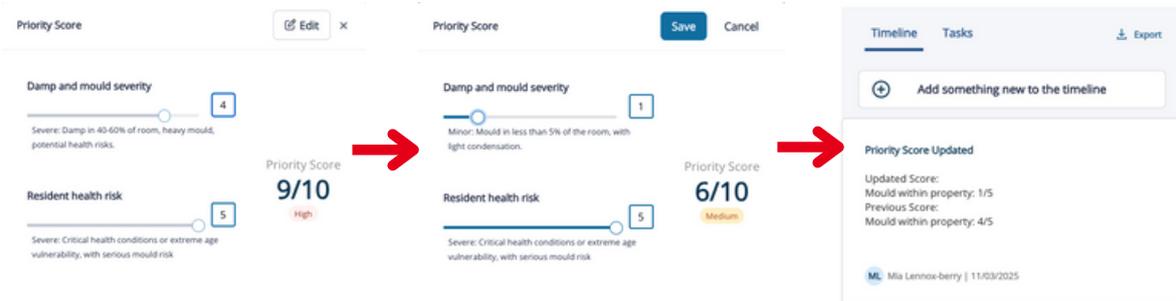
Send Resident Surveyor report

3d. Case Priority Scores

While on the Case View you will see the Priority Score, Mould Severity & Resident Health Vulnerability that was set upon opening the case.



As you go through the case you are able to edit the Mould Severity and Resident Health Vulnerability score, in turn changing your overall case priority. Every time this is amended and saved it will be added to the timeline.

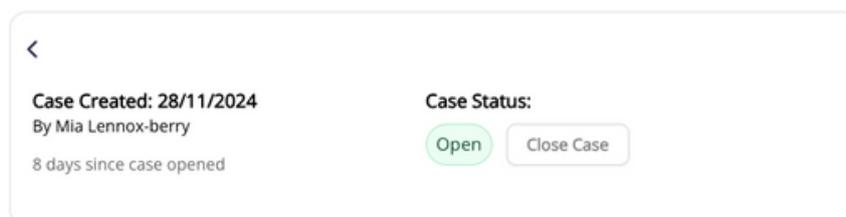


3e. Case Status

While on the Case view you can view the Case Status. This allows you to view the following:

- Date when the Case was Created
- Which user Created the Case
- How many days the Case has been open

You can also close the Case here.



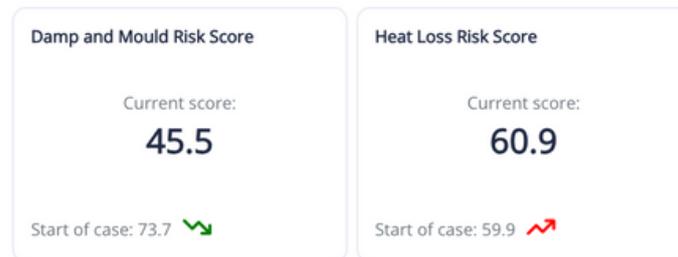
3f. Insight Scores

On the Case View you have a quick view of the Damp & Mould Risk Score and the Heat Loss Risk Score.

These are two of the eight Environmental Insights calculated using the Environmental Sensor data.

On both of the Insight widgets you can see the Risk Score at the beginning of the case VS the current Risk Score.

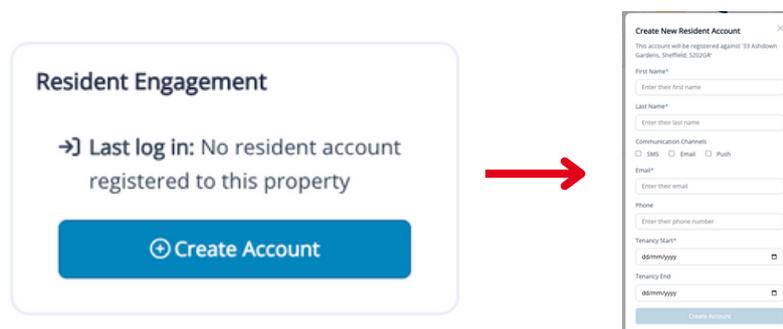
If there are no sensors this widget will say 'no sensors installed', until sensors are installed and the data can be utilised.



3g. Resident Engagement

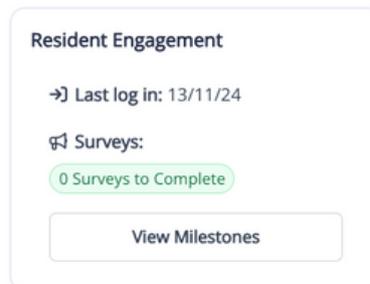
If you have not yet given the resident access to the resident app when you opened the case you will have a widget to Create them an Account.

When you click Create Account a pop up will open to input their details.

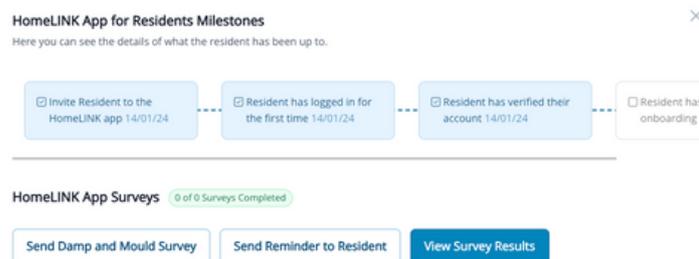


3g. Resident Engagement

If the resident has access to the app, or you have just given them access to the app, the widget will change to show the below:



If you click “View Milestones”, it will open up a timeline of Resident events for you.

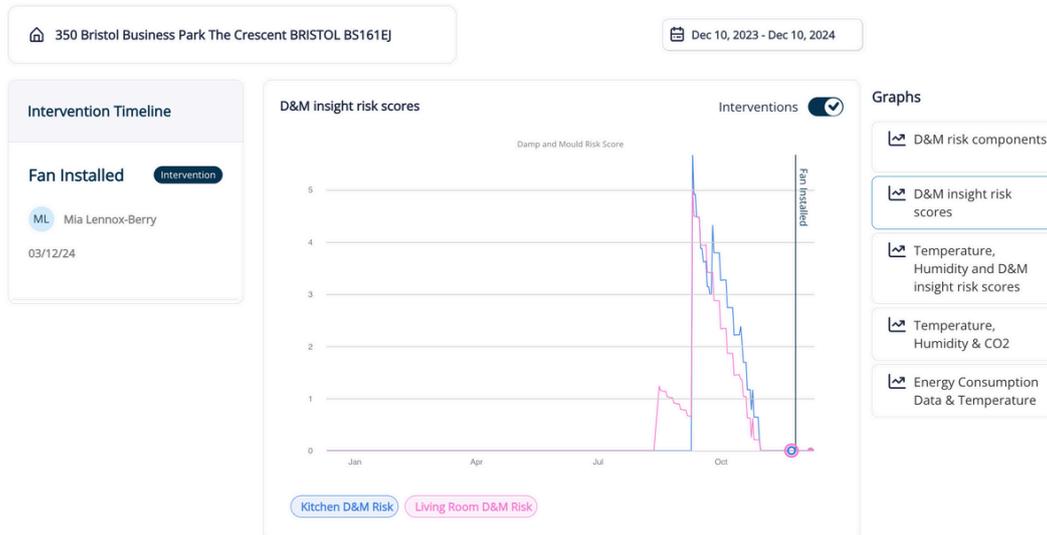


Once on the above timeline you will be able to send the resident a Damp & Mould Survey to complete. You will also be able to send them reminders if they fail to complete the survey.

Coming Soon . . . The ability to send the resident information from the case and timeline, such as the Landlord Damp & Mould Survey.

Section 4: Analysis View

As a whole view:



On the Analysis View you will find all graphs showing the Environmental Sensor data. This will help you investigate and identify the root cause of the damp & mould.

4a. How to Navigate

Interventions:

On each of the graphs in the analysis view you will have the quick view to the left of the 'Intervention Timeline', allowing you to easily see any interventions which have been applied to the case.

You can add multiple interventions.

You can use the toggle to decide to view the intervention lines on the graphs or turn them off, this button is located at the top right of each graph.



Interventions

Date Selector:

The date selector allows you to choose the date range you are looking for, which enables you to look at key moments of interest through the case and focus on specific timeframes.

The date range you have chosen will remain in place while you toggle between the different graphs available in the Analysis View.

You can use the scroll function on your computer to zoom in and out on all of the graphs to view more granular information.

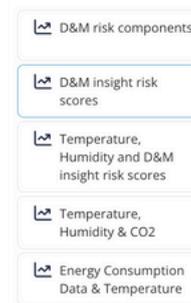


Picking your Graph:

On the right hand side of the Analysis View you will find a list of different graphs you can move between.

Each graph shows different data, which we will explore in the next section.

Graphs



Please note, the Energy Consumption Data and Temperature graph will only show Energy Data if you have this enabled. We are currently in our testing phase of the release of Energy Data.

4b. Graphs

On all graphs, when you hover over the data you will see a 'Tool-Tip' pop up above, detailing what you see on that part of the graph.

D&M Insight Risk Scores:

On the Damp & Mould Risk Scores graph you will find the score for each room within the property, the score is from 0-100. This is from our Damp & Mould insight, utilising Humidity and Temperature data from the Environmental Sensors.

Low risk - 0-33.3

Medium risk - 33.4-66.6

High risk - 66.7-100



Temperature, Humidity & CO2:

On this graph you will find Temperature, Humidity & CO2 readings from the Environmental Sensors.

The optimal zones for each are outlined below:

NHS recommendation for Temperature: 18-25 Degrees

British Standard Guidance for Humidity: 40%-60% Relative Humidity

Research Paper Guidance: Indoor maximum 1000PPM for CO2. Outdoor levels are 400PPM



4b. Graphs

Temperature, Humidity and D&M Insight Risk Scores:

This graph combines the Temperature & Humidity Readings from the Environmental Sensors with the Damp & Mould Insight Risk Score to allow you to see how the readings impact the Damp & Mould Risk in the home.



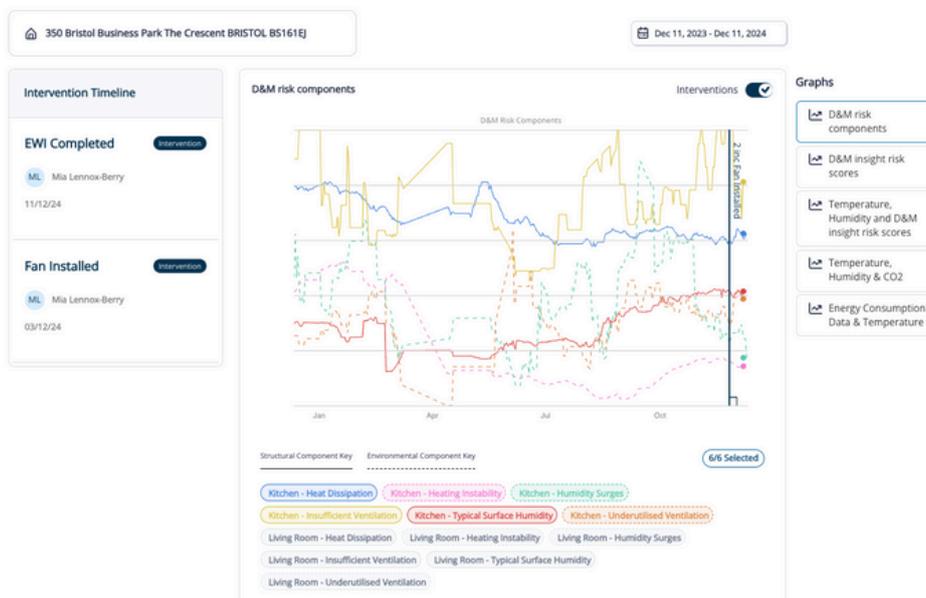
D&M Risk Components:

On this graph you will find our six Damp & Mould Risk Components. Three Structural: Heat Dissipation, Typical Surface Humidity, Insufficient Ventilation. Three Environmental: Heating Instability, Humidity Surges, Underutilised Ventilation.

Each component is given a score from 0-10, 0 being the least contributing component, 10 being the biggest contributing component to the risk of D&M. The components are to help you find the Root Cause of the D&M, enabling you to target resources to resolve the most contributing factor.

You can learn more about our D&M Risk Components in our stand alone D&M Risk Components article on our Knowledge Base.

You can choose up to six data sets to view on this graph, toggling between rooms and components.



Section 5: Support

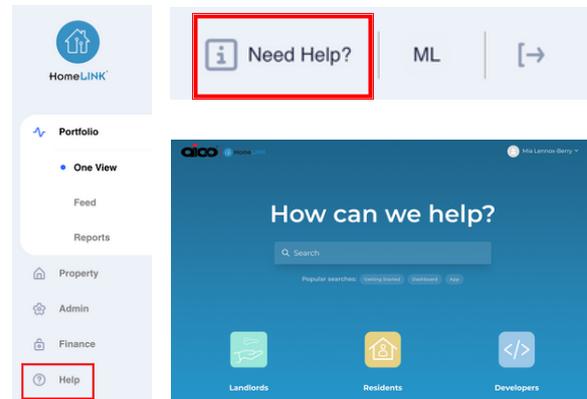
5a. Knowledge Base

To access the knowledge base you can click any of the 'Need Help?' buttons on the portal.

You will also find an abundance of resources, including:

- Insights article, explaining how they are all calculated (Landlords Section)
- How to try the resident app yourself (Residents Section)
- How we can do API's (Developers Section)

Along with many other support documents.



5b. Technical Support

You can contact the Aico Technical Support department using the below details:

Contact Number: 01691 664 100
Contact Email: enquiries@aico.co.uk
Website: www.aico.co.uk

5c. Customer Success Support

You can contact the Customer Success department using the below details - they can support you with any Case Management or HomeLINK Portal needs:

Contact Email: customer.success@aico.co.uk