

Batch Opening and Closing Files

Overview

CMPOne's batch programs allow you to open or close multiple case files at one time. The method used to identify the files depends on the batch process:

- Files can typically be batch opened using their referral date.
- If the referral date does not accurately identify the files to be opened, a custom report can be used instead.
- Files must be identified through a custom report before they can be batch closed.

Before running either process, carefully review the selected date range or custom report. All eligible files matching the selected criteria will be processed.

Batch Opening Files

Files with a status of New File Pending, or NPEN, can be opened together through the Open Files batch program. There are two ways to identify the files you want to open:

- Use a referral date or date range.
- Use a custom report.

Using the referral date is generally the simplest option. A custom report is only necessary when the referral date does not accurately identify the files that should be opened.

Open Files by Referral Date

If the pending files have a referral date that distinguishes them from other pending files, you can open them without creating a custom report.

- Navigate to Administration > Batch Programs > Open Files.
- Enter the beginning of the applicable date range in the Open Date Start field.
- Enter the end of the applicable date range in the Open Date End field.
- Leave the Custom Report Source blank.
- Verify that the date range will include only the files you intend to open.
- Click Open Files.
- Click OK when prompted to confirm that you want to open the files.

A message will appear indicating that the batch opening process is underway.

Important: All eligible pending files within the selected date range will be opened. Individual files cannot be excluded after the batch process begins.

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Open Files Using a Custom Report

Use a custom report when the referral date or date range would include files that should remain pending or when another set of criteria is needed to identify the files.

The custom report must return only the files you intend to open.

Create the Custom Report

- Navigate to Tools > Custom Reporting.
- Click Add New Report.
- Enter a descriptive report name, such as Files for Batch Opening.
- Add the following fields from the Case File fieldset:
 - File Number
 - Status Code (*Note: Add a filter to limit the Status Code to NPEN.*)
 - Referral Date
 - Any other fields needed to identify the correct files
- Add any additional filters needed to return only the files you intend to open and save.

For more detailed instructions about building and filtering reports, please refer to the [Custom Reporting help document](#).

Review the Report Results

Carefully review the results before proceeding. The report should include only files with an NPEN status that are ready to be opened. If the results include files that should remain pending, revise the report filters and execute the report again.

Important: Every eligible file returned by the selected custom report may be included in the batch process. Verify the report results before continuing.

Run the Batch Open Process

- Navigate to Administration > Batch Programs > Open Files.
- Under Custom Report Source, select the custom report you created.
- Confirm that you selected the correct report.
- Click Open Files.
- Click OK when prompted to confirm that you want to open the files.

A message will appear indicating that the batch opening process is underway.

Batch Closing Files

The Close Files batch program uses a custom report to identify the files that should be closed. The selected report must return only the files you intend to close.

- Create the [Custom Report](#).
- Review the Report Results.
- Run the Batch Close Process:
 - Navigate to Administration > Batch Programs > Close Files.

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- Under Custom Report Source, select the report containing the files you want to close.
- Select the appropriate Default Closure Reason.
- Click Close Files and then OK when prompted to confirm that you want to close the files.

A message will appear indicating that the batch closing process is underway.

Verify the Batch Results

After completing either batch process, review the log to confirm that the files were processed successfully.

- Click **View Log** after the batch finishes.
- Review the results for files that could not be opened or closed.
- Open one or more of the affected case files to verify that the status was updated correctly.

If the batch did not process as expected, contact a CMPOnline representative for assistance.

Questions?

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