Track your casework

Every live application, pre-app, appeal and condition in one tracker, with the dates that matter counted down. Most records start from a council or Inspectorate document: drop it in, check what was read, save.

1. Start a record from the document Casework, then the drop zone on the Overview

1. Open **Casework**. The Overview shows the **Quick Update** box, **Drop a casework document** and a map of your live casework; **Search your casework**, at the top, finds any case.
2. Drop a validation letter, decision notice, pre-app response or PINS start letter on the drop zone, or paste the text with ⌘V. PDF, Word, .rtf, image, .eml and .msg files are read; a scanned PDF can take two or three minutes, so leave the tab open.
3. The document is classified and matched to an existing record by reference or site address. If none matches, a new one is created and opened for you in **Edit Application**, **Edit Appeal** or **Edit Pre-App** with the fields filled in.
4. Read the amber banner, **Please verify before saving**, and check every field, in particular the LPA, the application type and the dates. A field the document did not state is left blank rather than guessed; fill it in yourself. Then tap **Save**.

> A decision notice is kept with the record and opens from the **Notice** button. A discharge-of-conditions decision attaches to the original permission's conditions automatically when that permission is already in your casework, so no second record appears.

2. The sections tabs across the top: Overview, Applications, Pre-apps, Conditions, Appeals, Watching

1. **Applications.** Live applications sit in the top table with the officer, the determination target and your status note. Determined and withdrawn ones drop to the lower table by themselves. The **Target** column shows the extension-of-time expiry instead of the statutory target once **EOT Agreed** is ticked and a date entered.
2. **Pre-apps.** The **Response Target** is calculated from the date received in working days: 20 for householder, minor, heritage and other enquiries, 30 for major and strategic ones. Record it as Positive, Negative or Mixed.
3. **Appeals.** Start one from the PINS start letter: the reference, procedure, key dates and inspector are read from it. Each appeal carries up to four dated deadlines with their own labels, the first two preset to **LPA Statement Due** and **Final Comments Due**. Tick **Costs Exposure** where costs are in play. Drop the decision letter to close the record.
4. **Conditions.** After a decision notice is read, a **Conditions Found** prompt offers to add them to the Conditions Monitor. Each permission becomes a card with the count of conditions, those still to discharge and those discharged, and the time left to implement.
5. **Watching.** Other people’s cases you follow, added by reference from the council’s register and kept current like your own.

Add a record by hand with **Add Application**, **Add Pre-App** or **Add Appeal** when there is no document to drop. Click any row to open its case card, with the register's record beside yours; **Edit case** opens the form.

3. Dates and the briefing what the colours mean

1. Each application type carries its statutory period: 8 weeks for most, 13 for a major, 16 for EIA development. The **Det Target** is the date on the validation letter or the one you enter; an agreed extension of time is shown alongside, not written over it.
2. Countdown chips turn amber inside 14 days and red inside 7, or 5 for an appeal deadline, and read **OVERDUE** once the date has passed. A record goes red when a target, committee date or internal deadline is under 3 days away. **No Exposure** keeps an application green.
3. Consent expiry is set at three years from the decision for an ordinary approval, and left blank for discharge, reserved matters, prior approval, certificate and advertisement decisions.
4. The **Deadlines briefing** is on Home. It lists everything due in the next 14 days as **Urgent** (overdue or within 2 days), **This week** and **Next 7 days**, with a short written summary made when you open it. The lightbulb on a row silences it: still tracked under **Silenced**, no longer flagged red. Silencing is remembered on the device you set it on.

4. Keep it moving Quick Update, Register, the schedule

1. **Quick Update.** Type what happened in plain words: "EOT agreed on Barnham until 30 April", "condition 4 on 23/00123 discharged", "Mill Lane withdrawn". The matching record is updated and the change reported back; if the instruction is ambiguous it asks one question first.
2. **Register** (**LPA Register** on an appeal). Opens the council's own register with the reference copied to your clipboard, ready to paste into its search. Idox and Ocella registers open on the search result for that reference.
3. **Kept current.** Every Monday the council's register is read; where it records a decision your case lacks, an amber line offers it, and nothing changes until you **Accept**.
4. **Conditions schedule.** Open a permission's conditions, set each one's status (Not Started, In Progress, Submitted, Discharged, Removed, Noted), correct a type the reader got wrong, and record the discharge reference. **Preview Schedule** builds the A4 schedule, with Download and Print.
5. Where a record's address matches one of your sites, an amber badge on the row jumps to it, and the site lists the **Casework on this site**.

Casework is yours

In a practice, a shared site is visible to the colleagues you choose. Casework is not shared: each record belongs to the person who created it.

Works offline, syncs after

Records are saved on the device first and synced to your account. Reading a document, Quick Update and the briefing need a connection and AI access.

The reader is not the record

Extraction is read from the document and can be wrong. The amber banner is the prompt: the council's notice and the Inspectorate's letter are the authority, not the fields.

Appeals, two places

Your own live appeals are tracked here. Decided appeals across England, searchable in full, are under Appeal Intelligence.