



## How we handle case work & referrals on CiviCRM, using Nook

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**nookcrm.com**





# Community energy



June 2026

## Community energy



# Lots of spreadsheets

J	K	S	T	U	X	Y	Z	AB	AD	AG	AJ	AL	AM	AO	AP
First name:	Surname:	Date 1st Contact	Date 2nd Contact	Date 3rd Contact	No. of home visits	No. of phone calls	No. of emails / texts	Fuel Voucher £	Reason for Fuel Voucher	Refer for BEC?	WDC Cost of Living Fund	Total income maximised	Energy advice provided	Total savings accrued	Any relevant information relating to support:
A	Smith	09/05/2025	14/05/2025	20/05/2025		3						£0.00		£0.00	
B	Smith	08/05/2025	12/05/2025	13/05/2025	1	9					Yes	£0.00		£255.00	
C	Smith	08/05/2025	13/05/2025	25/09/2025	2	14	7	£126.00	Disability	Yes	Yes	£226.00	Yes	£481.00	
D	Smith	08/05/2025	13/05/2025	20/05/2025	2	8	1		Low Income		Yes	£100.00		£355.00	
E	Smith	12/05/2025	13/05/2025	14/05/2025	2	9						£0.00		£255.00	
F	Smith	14/05/2025 (vm)	20/05/25 (VM)	30/05/25 (VM & text)								£0.00		£0.00	
G	Smith	14/05/2025	15/05/2025	20/05/2025	1	7		£34.00	Low Income	Yes		£74.00		£329.00	
H	Smith	13/05/2025	21/05/2025	04/06/2025	2	21	6	£104.00	Children U16	Yes	Yes	£154.00	Yes	£409.00	

# Which led to Nook

- Large Civi extension
- Moves much of CiviCRM into the background
- Leaves a rich case management system:
  1. Case Journeys, Steps
  2. Tasks
  3. “Triage” and Waiting Lists
  4. Referral forms
  5. Reassigning Tasks & Case owners
  6. “Fuzzy” case search
  7. “Running” Case Notes with @mentions
  8. Report template builder
  9. Dashboard
  10. Settings

# Demo

(If offline, see [nookcrm.com](https://nookcrm.com) for screenshots)



**BrumEnergy**

# BrumEnergy

- What's our story?
- Why we needed a referral / dispatch system in the first place
- Emailing case and referral information? :(
- Overhead of getting updates and reports from partner organisations

Referrals can only be completed by Health/Social Care Professionals or carers.  
There are two ways to make a referral:

**OPTION 1: Online referral form**

Complete the online referral form using the QR code or link below and a BrumEnergy advisor will get in touch with the person you have referred.



[www.bvsc.org/apply-for-advice-brumenergy](http://www.bvsc.org/apply-for-advice-brumenergy)

**OPTION 2: Give this card to those needing BrumEnergy advice**

Ask them to email [brumenergy@bvsc.org](mailto:brumenergy@bvsc.org) with the details below:

Name of referrer: .....

Organisation/role of referrer: .....

Name of person being referred: .....

Funded through National Energy Action's Warm Homes, Healthy Futures programme



Delivered by:



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#1. QR code linking to the online form



## Further Details

Can a message be left on the client's phone number

Yes  No

Does the client/patient require translation/interpretation services?

Yes  No

If yes, please state which language

Does the client belong to one of the following priority groups

- carer
- disabled
- expectant parent
- family with a disabled child
- family with a child under 5

Does the client's health issues fall within any of the following categories

*(tick all that apply)*

- Multiple Impairments
- Dementia
- Arthritis
- Cancer
- Asthma

Please include any additional information about the issues the client/patient is experiencing that might be relevant to the referral. This might include details of any progress or actions already taken, any known deadlines or sensitive issues, or any other forms of support you're aware of that the client/patient may have been referred to

**#.2 Cases referred  
via an online form**

# Dispatch List





[▶ More filters](#)

Client name	Date added	Last interaction	Urgency	Dispatched To	Dispatch Status	Remote Case ID
[REDACTED]	26th March 2026	14th April 2026	None selected	Home from Hospital Care	Accepted	C01003330
[REDACTED]	25th March 2026	13th April 2026	None selected	Home from Hospital Care	Accepted	C01003323
[REDACTED]	23rd March 2026	24th March 2026	None selected	Home from Hospital Care	Pending	C01003234
[REDACTED]	23rd March 2026	24th March 2026	None selected	Home from Hospital Care	Pending	C01003227
[REDACTED]	20th March 2026	13th April 2026	None selected	Home from Hospital Care	Accepted	C0100321X
[REDACTED]	19th March 2026	19th March 2026	None selected	- not dispatched -	- not dispatched -	- not dispatched -
[REDACTED]	18th March 2026	18th March 2026	None selected	Home from Hospital Care	Pending	C01002997
[REDACTED]	16th March 2026	16th March 2026	None selected	Home from Hospital Care	Pending	C0100298X

#3. Cases land in BVSC's Dispatch List screen

- Dispatch List
- Reporting
- Settings
- CiviCRM
- New Installer

# Update case details

Save Case Details

[← Back to Waiting List](#)

[Dispatch case](#)

ID: C01001532 Current stage: Waiting List Projects: Brum Energy

## Referral Source

Website

## Status

Open

## Case Team Members

Select

## Urgency

Select

## Case Owner

Select

[Show notes](#)



## Contact details

### First Name

### Surname

### Phone

Is Primary

### Email

Is Primary

[+ Add](#)

### Date of birth

#4. Cases can be 'dispatched' to appear in a network org's Nook

# Update case details

Save Case Details

← Back to Waiting List

Dispatch case

ID: C01001532 Current stage: Waiting List Projects: Brum Energy [edit](#)

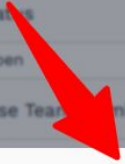
Referral Source  
Website

Status  
Open

Urgency  
Select

Case Owner  
Select

Show notes <



Which Nook instance should this case be dispatched to?

**Birmingham Settlement** Community Energy Birmingham ecobirmingham MECC Trust Home from Hospital Care New Hope Global Northfield Community Partnership

[X Cancel](#)

Phone   Is Primary

Email   Is Primary

[+ Add](#)

#5. Choosing the recipient org



# Waiting list

0 new this week

5 clients in Waiting list

[Add new client](#)

Created by : Anyone



Owned by : Anyone



Added : All time



Urgency : All



Projects : All



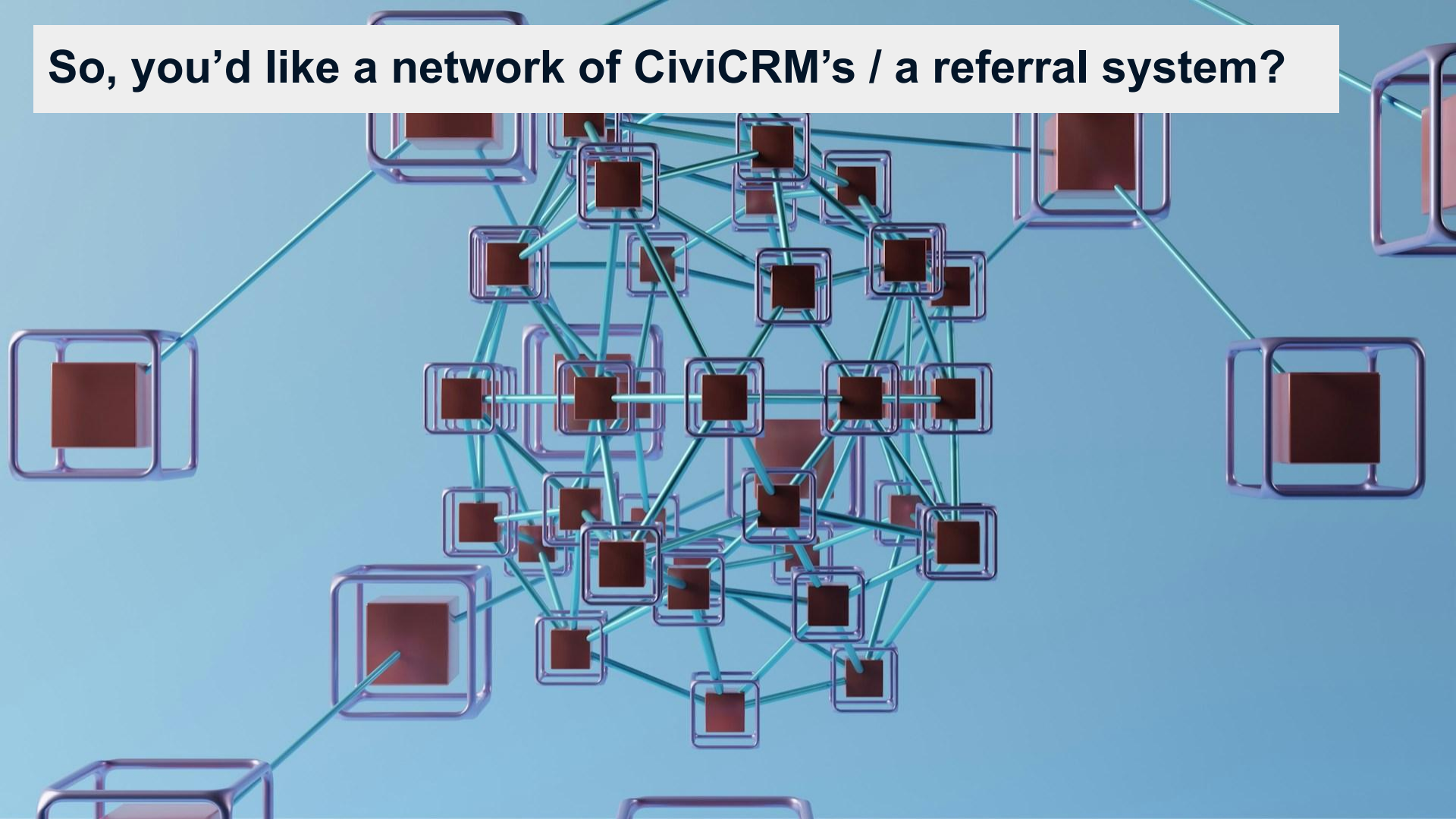
Status : Open



Client name	Date added	Inbound referral	Last interaction	Case owner	Projects	Urgency
[REDACTED]	16th November 2025	Event	19th May 2026	Frank Alsema	Energy Redress	Medium
[REDACTED]	16th November 2025	Self-Referral	19th May 2026	Frank Alsema	Energy Redress	Medium
[REDACTED]	16th November 2025	Self-Referral	19th May 2026	Hugh Powis	Energy Redress	High
[REDACTED]	16th November 2025	Phone call	19th May 2026	Kizito N	Energy Redress	Medium
[REDACTED]	1st August 2025	Event	19th May 2026	Kim Harries	Energy Redress	High

## #6. Cases appear in their Waiting List


**So, you'd like a network of CiviCRM's / a referral system?**




# Our lessons learned and moving forward

→ How should **cases be marked as Accepted / Rejected** by the receiving org? 

- a. Should interacting with a case auto-mark it as Accepted?
- b. How will the 'dispatching' org be notified of acceptance?


→ Should partners in the network be able to dispatch cases between themselves? 

→ Will partners *only* be using Nook/Civi for case management?  
Or will they be using it **alongside an existing tool?** 

→ Case **reporting needs to be standardised** across the network

*(In the end we logged into each org's Nook to gather the numbers we needed.)*

→ For the same reason, **Case journeys** were also standardised.

→ How to handle **double counting** of the same cases referred across the various Nooks? 

# BrumEnergy

“Instead of chasing updates and piecing things together, we now have a clear, secure picture of every case - which has transformed how we work with our partners.”



# Thank you!

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**nookcrm.com**

