Cases Module

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# Overview

Cases are defined as a centralized hub for tracking, documenting, and monitoring the progress of activities, as well as managing communication and collaboration among admins, clients, and other stakeholders. The system typically includes case tracking, document management, task management, reporting, and integration with other relevant systems or databases. Its primary purpose is to streamline and optimize advocacy efforts, improving efficiency, organization, and effectiveness in advocating for clients or causes.

## Case TrackingPlaceholder image

Systematically document and update information related to the case as it moves through various stages and milestones. This allows effective monitoring and recording of the progress and status of a particular case or matter.

## Easy Collaboration

Share information and exchange ideas to work together towards common goals and objectives related to the case.

# How To

## [Set up a case](#pqcm6ppzzwut)

## [Change Case Statuses](#dzaiy2x0vzb2)

## [Case Assignments](#o6taka3tq6nn)

## [Invite to case](#97frtmokn1mh)

## [Patient Information](#s28vw7mex05u)

## [Service Information](#kenf301zfj2j)

## [Referring Physician](#kenf301zfj2j)

## [Provider Information and search](#indeymkvjava)

## [Notes](#o21tf03e79u3)

## [Files](#2xtx7a10zw9y)

## 

**Set up a case**

A **case** serves as a method to monitor and record the progress of a client as they navigate through each significant stage or milestone.

To add a new case:

* Go to the Cases module from the left menu bar
* Click on the +Add button
* Search for a client that you want to create a case for
* Click next
* Add service (Optional)
* Click Save

Please note that only cases that have been assigned to you will be shown by default under the cases module unless the checkbox for “Show all” cases is selected.

**Case Status**

The case status serves as a high-level representation of the different milestones that a case goes through as it progresses through various stages of its life cycle.

To change case status:

* Go to the Cases module from the left menu bar
* Click on the drop down menu on the top right side of the case. There are six options:
* Requested
* Acknowledged
* In Progress
* Completed
* Closed
* Deleted

Please note that Closed and Deleted cases will not be listed by default, to view Closed/Deleted cases:

* Go to the Cases module from the left menu bar
* Click the filter icon in the search bar
* And choose Closed or Deleted case status as needed to filter and find them

**Case Assignments:**

The "created by and assigned to" section pertains to the information regarding the individual or entity responsible for creating and assigning the task or case.

To assign a case to an admin:

* Go to the Cases module from the left menu bar

Navigate to the “Add Assigned To” link to search for the admin.

* You can edit and change the assignment as many times as you like.
* Clicking the bell icon () will send an email notification to that admin who is assigned to the case.

**Invite to case**

You can invite someone who does not have access to Vitafy to **collaborate** on a case with you. Doing so will grant them access to the complete case, enabling them to contribute notes and upload files to facilitate the progress of the case.

To invite a third party to the case:

* Go to the Cases module from the left menu bar
* Navigate to the case you want to invite someone to collaborate on
* Click on the mail icon 
* Enter email address
* Add a note (optional)
* Click save
* History of all Invitees will be shown on the history tab inside the mail icon  pop up

**Patient Information**

Each case includes a snapshot of all the information of the client for whom the case is for.

**Service Information**

The **service name** encompasses all the assistance and support that you offer to your esteemed customers. These services are provided without charge and are aimed at guiding clients through various processes.

To add service:

* Go to the Cases module from the left menu bar
* Find the case you want to update
* Click on one or many services you want to add for this case.
* It automatically saves to a case
* Click the X in the upper right corner to exit

**Referring Physician**

A referring physician is a medical doctor who directs a patient to seek care from another physician or specialist for further diagnosis, treatment, or consultation. The referring physician evaluates the patient's medical condition and determines that the expertise or specialized services of another healthcare provider are required.

To add referring physicians:

* Go to the Cases module from the left menu bar
* Find the case you want to update
* Click on Add Referring Physician
* Search by NPI or Provider Name
* Select physician from dropdown list
* IF physician is not listed you can add it manually
* On bottom of the page Click here to add physician
  + Type in First and last name
  + NPI
  + Specialty
  + Add Facility information (optional)
  + Click save

**Provider Information and search**

The provider section refers to the healthcare professional or entity that you are engaging with or collaborating with to advance the case until its completion. This selection is made by conducting a search below, where you can explore and evaluate various providers before making a decision.

To search for providers:

* Go to the Cases module from the left menu bar
* Find the case you want to update
* Go to provide search
* Either search by city, state, or zip
* Choose mile radius
* Click search

**Notes**

In this section, you have the ability to maintain a record of notes, progress, and milestones pertaining to the case. It allows you to communicate with the client, admins, or any invitees associated with the specific case that is being actively worked on.

To add notes:

* Go to the Cases module from the left menu bar
* Find the case you want to update
* Type your notes in the text box and click Submit
* To **tag** specific users/clients
  + In the note use the **@** and start typing the name of client or admin user and/or any other people associated.
  + Select from dropdown
  + They will be notified by email with a link view, respond or upload a file in the note.
* Notes can be **edited** or **deleted** by clicking the edit and trash button respectively. (Can be seen when hovering over notes).
* Edit **history** can be seen by clicking the history icon () on the right side of the note.
* The **eyeball** can be crossed out or not depending on accessibility to view; anything directly related to the **client** (**tagged**) can be seen by them by default, to allow access to view notes uncross the eye icon.

**Files**

Within this section, you have the option to include any files relevant to the case that you wish to retain. Files of various types can be uploaded and stored here. Additionally, clients are also able to upload any necessary files pertaining to the case.

To upload files:

* Go to the Cases module from the left menu bar
* Find the case you want to update
* Click on the files tab next to notes
* Click Upload files.
* There are four options to choose from: computer, profile, files (module on the left bar), url.
* You can drag and drop files within the box or click to browse.
* Click upload

Click on the ellipses on the right side of the file to: Add to [clients](https://docs.google.com/document/u/0/d/1U56J66Q1uRzs3DVkURMmQuJKaOeLYn1FhTZIQinRE7c/edit) profile, download, share (enter email address and note), rename and delete.

NOTE: If there are any missing items or if you require access to something mentioned above, please feel free to contact Vitafy support at support@vitafyhealth.com for any inquiries.