Cases Module

September, 2023

Access information about your case such as case **notes** and **files** using the cases module. This module also allows you to **communicate** with the advocate who is assigned to your case using tagged notes as they document and update information related to the case as it moves through various stages and milestones.

# How To

## [View case Statuses](#dzaiy2x0vzb2)

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**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:

* Requested
* Acknowledged
* In Progress
* Completed
* Closed
* Deleted

You can view your case status on the top right corner of each case

**Case filter**

In the event that you have multiple cases, you can use the search bar on the top left to filter.

**Case Assignments**

The "created by and assigned to" section refers to personnel who created and are currently assigned to your case respectively.

**Patient Information**

This section is pulled from the **client module** as a snapshot in time of when the case was created. The information provided includes Name, dependency, phone, email, date of birth and address.

To make changes to patient information, click edit in the upper right corner.

**Service Information**

The **service name** encompasses all the assistance and support that you are receiving from your advocates.

**Referring Physician**

This section includes information about referring providers/physicians added by an advocate to direct a patient to seek care from another physician or specialist for further diagnosis, treatment, or consultation.

**Provider Information**

The provider section refers to the healthcare professional or entity that your advocates are engaging with or collaborating with to advance the case until its completion.

**Notes**

In this section, you can view a record of notes, progress, and milestones about the case. It allows you to communicate with the advocates, or any invitees associated with your case that is being actively worked on.

To add notes:

* Type your notes in the text box on the bottom right corner and click Submit
* To **tag** specific users/clients
  + In the note use the **@** and start typing the name of the advocate.
  + Select from dropdown
  + They will be notified by email with a link to the portal allowing them to 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.

**Files**

Within this section, you have the option to include any files relevant to the case that you need to upload as advised by your advocate. Files of various types can be uploaded and stored here.

To upload files:

* Click on the files tab next in the far right
* Click Upload files.
* There are four options to choose from: computer, profile, files (module on the left bar), url.
* You can also drag and drop files within the box or click to browse.