

foxo Guide

Cases



What are Cases?





What are Cases?

A Case is an actionable request or task that can be sent into a Team or to an individual with **high**, **urgent** or **normal** priority for response. A member of the receiving Team - or the designated individual can claim the Case, resolve it and engage in a 1:1 Chat with the Case Creator for further communication if needed. The Case can also be forwarded to other Teams or individuals for assistance.

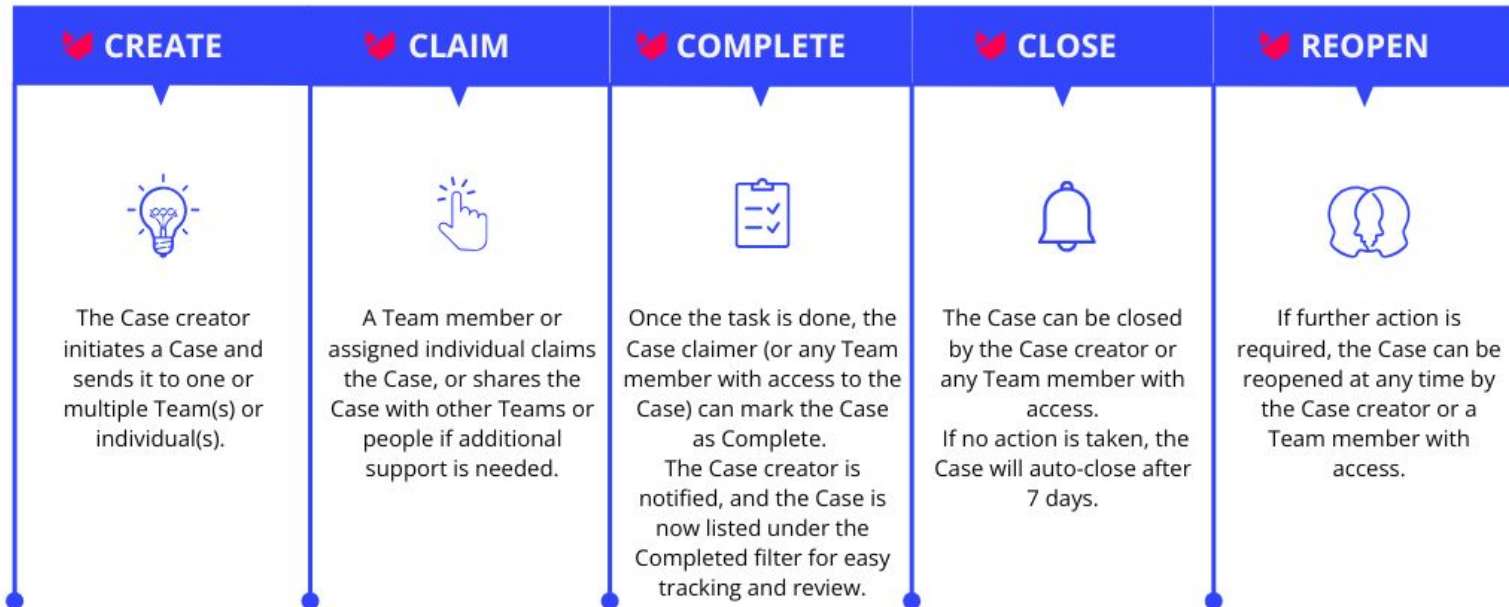
Here are some example scenarios:

- A Clinician can send a Case to an Admin Team to assist with missing patient information
- A Technician can send a Case to a Clinical Team for protocolling review.
- A Referrer can send a Case to a Specialist Team to discuss patient results.

Case Lifecycle



Case Lifecycle



Note: For workflows where claiming and completion isn't required, Cases can simply be closed once actioned.

Creating Cases

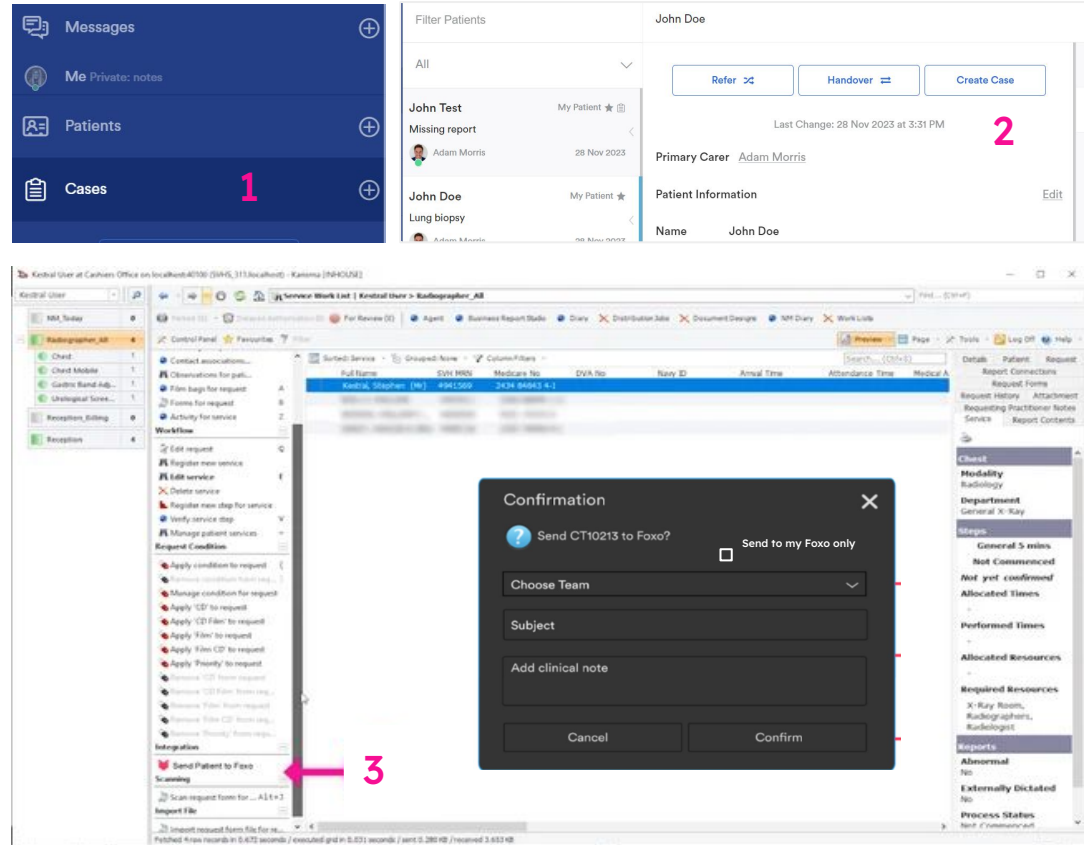


- Manually
- Via integration



Case Creation

There are three different ways to create a Case:




The image shows three screenshots illustrating different ways to create a case in the system:

- Under the menu **Cases** (+)**: The first screenshot shows a sidebar menu with options: Messages, Me Private: notes, Patients, and Cases. The 'Cases' option is highlighted with a red '+' icon and a red number '1'.
- From a **Patient Card****: The second screenshot shows a patient card for 'John Doe' with a 'Create Case' button. A red number '2' is next to the button.
- From a clinical system if an **integration** is set up**: The third screenshot shows a 'Send Patient to Foxo' dialog box. A red arrow points to the 'Send Patient to Foxo' option in the 'Integration' section of the sidebar, with a red number '3' next to it.

1. Under the menu **Cases** (+)
2. From a **Patient Card**
3. From a clinical system if an **integration** is set up. All patient data will be pushed automatically into Foxo.

Creating a Case in Foxo manually (1)

1. Click on the plus icon next to Cases (1), or in a Patient Card 'Create Case' (2)
2. Select the Team(s) to send the Case to. You can add multiple teams
3. Add a subject and more information in the description if required
4. If you are not creating the Case from a Patient Card, you have the option to select a patient here. It is not necessary to attach a Patient Card.



Radiology Concierge
of Medico
Radiology Concierge
4 members 4 open cases

Select Teams / Individuals

Missing Imaging

Send a Message and/or share a Patient Card to this Team

Select Patient

Attach Media (Drop file here)

Normal

High


Urgent

Reset

Submit Case

Creating a Case in Foxo manually (2)

- Cases can be prioritised as **Normal**, **High**, or **Urgent**. If the Case remains unactioned, notifications to the members of the receiving Team or individual receiver will be escalated through the following channels:
 - 🔴 Urgent (Red) SMS sent to Team members after **5 mins**
 - ★ High (Yellow) Email sent to Team members after **10 mins**
 - 🔵 Normal (Blue) Email sent to Team members after **24 hours**
- Add reports, scans, images or other files via the **Attach Media** button
- Once done, click **Submit Case**.



Radiology Concierge
of Medico
Radiology Concierge
4 members 4 open cases


Select Teams / Individuals

Missing Imaging

Send a Message and/or share a Patient Card to this Team


Select Patient

Attach Media (Drop file here)



John Smith
lorem ipsum
Dr. Sarah Test

1 of 8 maximum files added



Normal

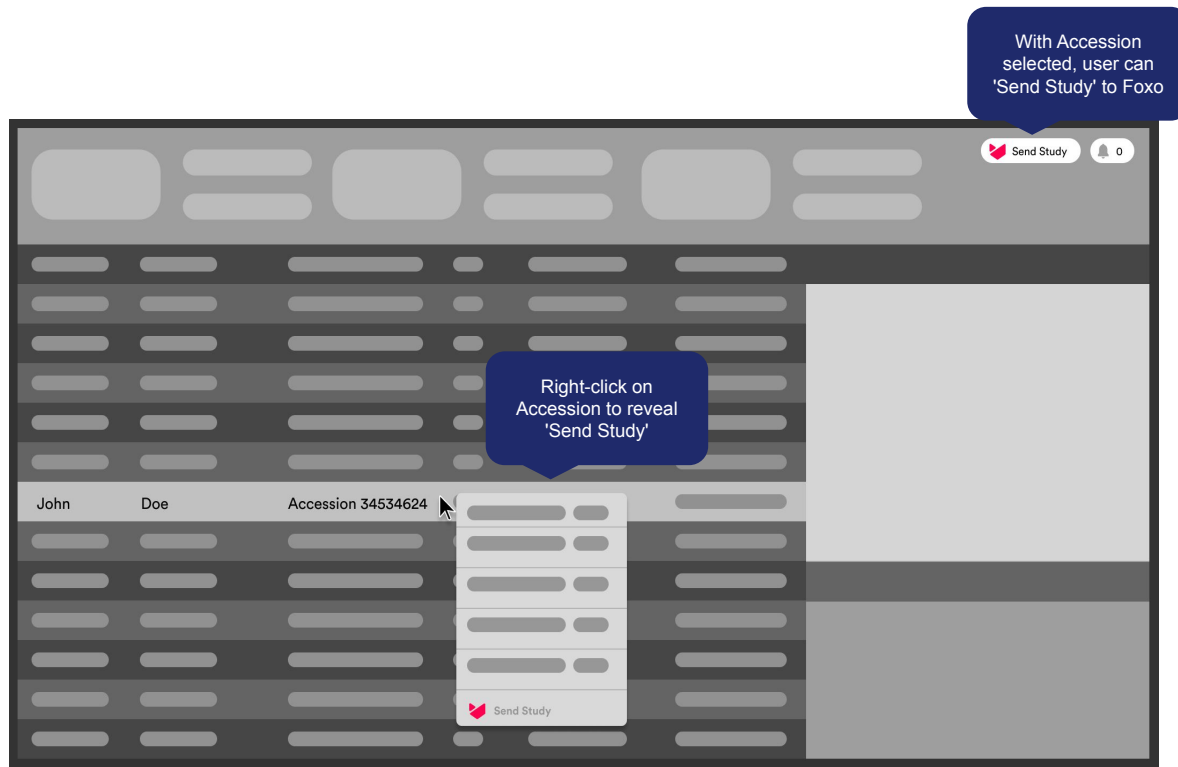
High

Urgent

Reset

Submit Case

Create a Case via integration with a clinical system (e.g. Worklist launch point, RIS, PACS)




In your clinical system, look out for the 'Send to Foxo' icon.

Note: The availability and location of the Foxo button may vary depending on the clinical system and the specific integration.

Create a Case via integration with a clinical system (e.g. RIS)

Depending on the integration setup with your specific provider, you **might have two options**:

1. **Send to my Foxo (or leave the 'Send to Team' checkbox unticked)** This will send patient data to your patient list under the Patient menu  allowing you to send the Patient Card via Foxo Messages to an individual
2. **Send to Team:** This will send the patient data via a **Case** with the Patient Card attached to a Team
3. **Send to Anyone*:** Outbound communication to an external user, e.g. to referrers or patients for critical results notification.

**Under Development*

Create a Case via integration with a clinical system (e.g. Worklist launch point, RIS, PACS)

3*

Send to Anyone (SMS/email), external user for e.g. Critical Results

**Under Development*

2

Send as a Case with patient data to a Foxo Team to resolve

Optional hide accession from group worklist until Case has been resolved →

! Send Study

To Anyone

Send to Team

To me

Dr. Gary Wood
0437 925 888

Subject eg. Critical Result

▼

Body Message

John Doe

×

Attach Media

☒ Remove exam from worklist until resolved

Back

Send

Send Study

0

1

Send To Me: Creates Patient Card only under your Patient

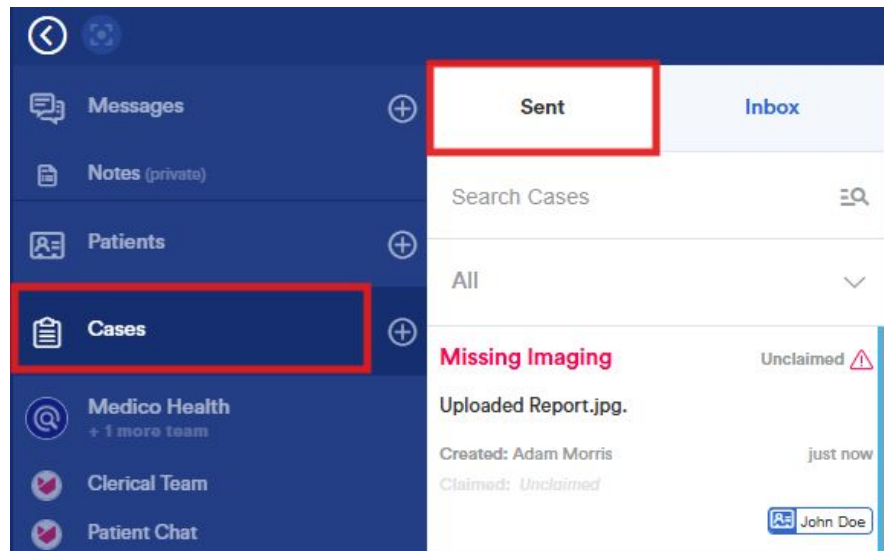
← Selected Study

foxo.com

12

Once your Case has been created, you'll find it Foxo under your 'Sent Cases'

Under the **Sent Cases** tab you'll find a list of all Cases that you have sent to a Team or Individual. You can use the **All** filter to sort according to active, pending (=unclaimed) or closed Cases.



Receiving Cases



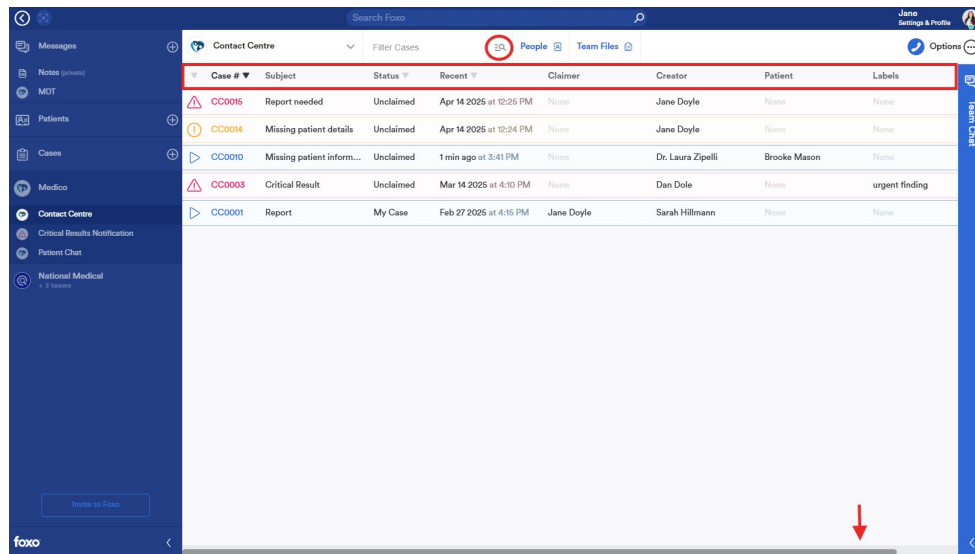
- Via a Team
- As a Direct Case



👉 Receiving Cases via a Team (Powerlist)

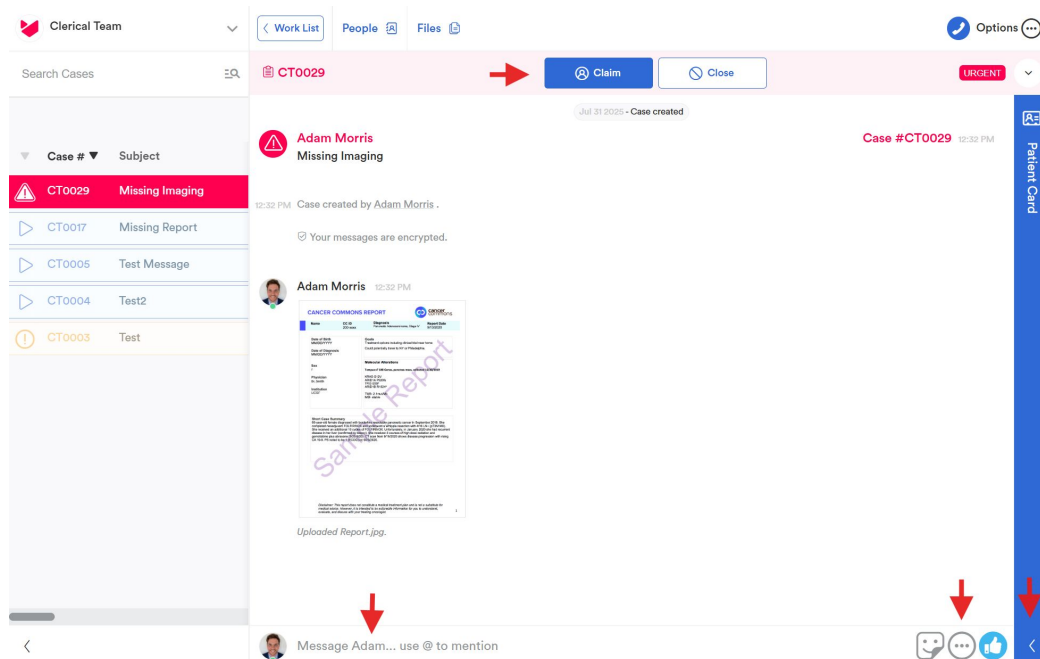
1. Navigate to the Team that received the Case and go to the Case inbox or Powerlist.
2. You can filter based on status or label or sort on most recent or status.
3. Click on the Case to open it.

💡 Tip: Attach labels to the Case for easy filtering in the Case list, allowing you and your team to group and search for specific Cases.



👉 Claiming Cases

1. After accessing the Case, you have the option to **claim** and action it or forward it to another Team/individual for assistance.
2. Inside the Case, you can engage in a direct conversation with the Case creator using the Case chat.
3. You can also access the Patient Card (if there is one attached).
4. And add any requested media or files using drag and drop or the three dots in the chat field.



Inside a Case

Work List

People

Files

CT0029

Case ID

Mark Complete

Abandon

Close

URGENT CLAIMED

Options

12:32 PM Case created by Adam Morris .

Your messages are encrypted.

Adam Morris 12:32 PM

CANCER COMMONS REPORT

Name	CC ID	Diagnosis	Report Date
NAME0000000000	200-0000	Diagnosis	01/15/2020

Date of Birth

NAME0000000000

Gender

NAME0000000000

Date of Diagnosis

NAME0000000000

Site

NAME0000000000

Physician

NAME0000000000

Ref. Source

NAME0000000000

Institution

NAME0000000000

Ref. Source

NAME0000000000

Short Case Summary

NAME0000000000

Uploaded Report.jpg.

Sarah Test 12:41 PM

Hi Adam! Looking into this now.

12:41 PM Sarah Test (Clerical Team) has claimed this case.

Message Adam... use @ to mention

Options

- Print Case as PDF
- Team Settings (admins)
- Manage Team Notifications

Expand

To access more information

Three dots

Forward Case, add media or record audio

Case Chat & Activity Log

Patient Card

foxo.com

17

👉 Once you've claimed a Case, you'll find it under your **Inbox**

The screenshot displays the Foxo user interface. On the left sidebar, the 'Cases' option is highlighted with a red box. The main content area shows the 'Inbox' tab selected, also highlighted with a red box. A red arrow points from the 'All' filter to the 'Inbox' tab. The interface includes a search bar at the top right labeled 'Search Foxo'. The main view shows a list of cases, including 'CT0017' and 'Tam Proud Missing Report'. The bottom of the screen shows a 'Test' case with a 'Completed' status.

👉 Triaging Cases

If you need additional assistance from a specialised Team, you have the option to **share the Case with another Team or individual**

Clerical Team Options

CT0029 Mark Complete Abandon Close URGENT CLAIMED

12:32 PM Case created by Adam Morris .

Your messages are encrypted.

Adam Morris 12:32 PM

CANCER COMMONS REPORT

Report Date: 12/12/2023

Report Date Summary: [Detailed medical report text]

Uploaded Report.jpg.

Sarah Test 12:41 PM

Hi Adam! Looking into this now.

12:41 PM Sarah Test (Clerical Team) has claimed this case.

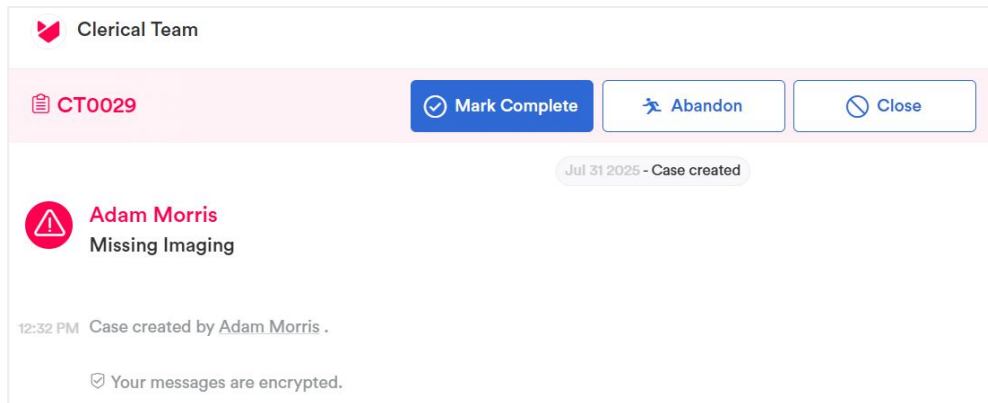
Message Adam... use @ to mention

Share Case
Share Media
Share GIFs
Record Audio

Abandoning Cases

1. If you've claimed a Case but are unable to proceed with it, you have the option to abandon a Case resetting its status to 'unclaimed'
2. This action notifies the Case creator and your Team members enabling someone else in the Team to claim and action the Case.


Note: Even if a Case is in a 'claimed' status and hasn't been abandoned, other members of the Team can still claim it. All activity is logged in the Case chat.





The screenshot shows a chat window for a team named 'Clerical Team'. At the top, there's a header bar with the team name and a red icon. Below this is a pink bar containing the case ID 'CT0029' and three buttons: 'Mark Complete' (blue), 'Abandon' (light blue with a red 'X' icon), and 'Close' (light blue with a red 'X' icon). A timestamp 'Jul 31 2025 - Case created' is displayed. The main chat area shows a red circular icon with a white triangle and the name 'Adam Morris' followed by the text 'Missing Imaging'. Below this, a message reads '12:32 PM Case created by Adam Morris.' At the bottom, a status message says 'Your messages are encrypted.' with a checkmark icon.


Mark Case Complete


1. Once the Case has been actioned, you can mark it as **Complete**.
2. The Case creator will be notified of this step.
3. This updates the Case status to Completed and it will appear under the Completed filter.
4. The Case can be marked as Incomplete if the action needs to be reverted.

 Clerical Team


 CT0029

 Mark Complete


 Abandon


 Close

Jul 31 2025 - Case created


 **Adam Morris**
Missing Imaging


12:32 PM Case created by Adam Morris .

 Your messages are encrypted.


 CT0029

Mark Incomplete

 Abandon

 Close

Jul 31 2025 - Case created

 **Adam Morris**
Missing Imaging

👉 Closing Cases

1. The Case creator or anyone with access to the Case can mark the Case as incomplete if needed.
2. This will notify the Case claimer, prompting them to review the Case.
3. Once the Case has been fully resolved, it can be closed. It will then be removed from the active Case list and appear under the Closed filter.
4. Anyone with access to the Case (Team members or the Case creator) will have the option to reopen it.

The screenshot displays the 'Inbox' tab in a case management system. On the left, a sidebar shows filters for 'Sent' and 'Inbox'. Below these are search and sort options. The main area shows a list of cases. The selected case, 'CT0029 | Missing Imaging', is highlighted. Its status is 'Completed' with a warning icon. The case was created by Adam Morris and claimed by Sarah Test. A 'Close' button is visible in the top right corner of the case detail view.

Help Hub

 www.foxo.com

 app.foxo.com

 hello@foxo.com

 foxo.com/ios

 foxo.com/android