foxo Guide

Cases

What are Cases?

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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.
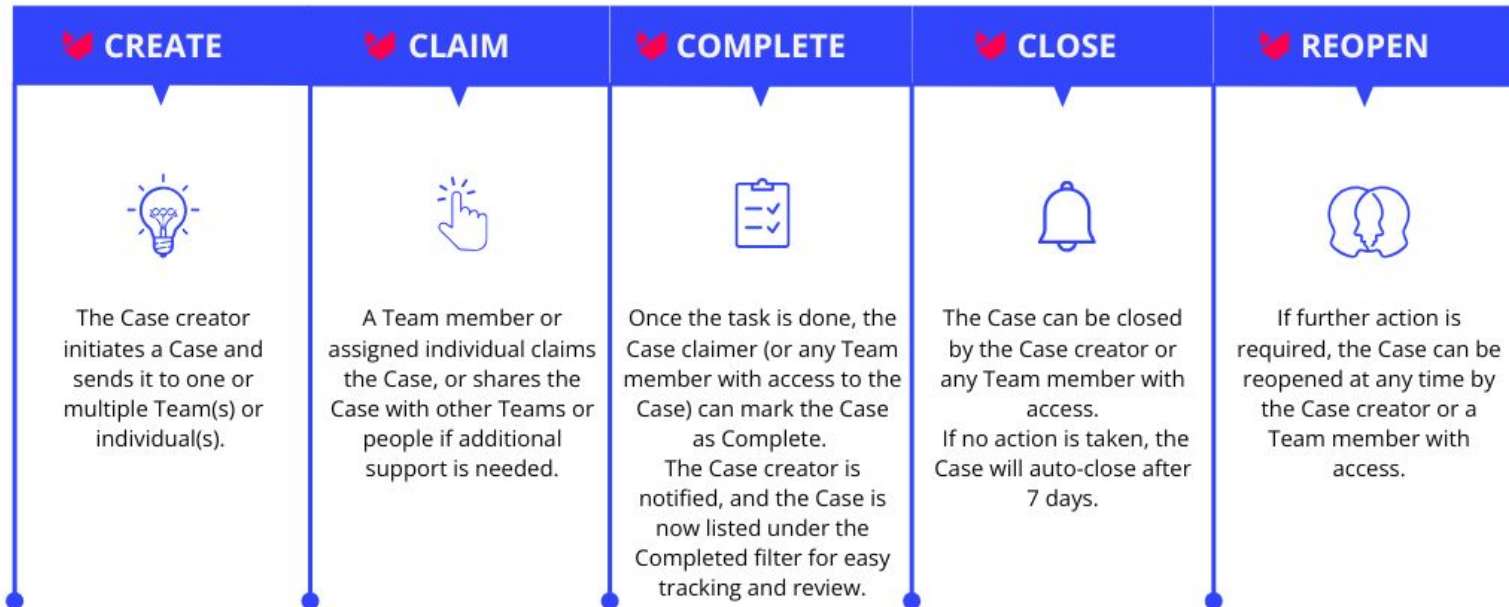
Here are some example scenarios:

- 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

✔ CREATE	✔ CLAIM	✔ COMPLETE	✔ CLOSE	✔ REOPEN
The Case creator initiates a Case and sends it to one or multiple Team(s) or individual(s).	A Team member or assigned individual claims the Case, or shares the Case with other Teams or people if additional support is needed.	Once the task is done, the Case claimer (or any Team member with access to the Case) can mark the Case as Complete. The Case creator is notified, and the Case is now listed under the Completed filter for easy tracking and review.	The Case can be closed by the Case creator or any Team member with access. If no action is taken, the Case will auto-close after 7 days.	If further action is required, the Case can be reopened at any time by the Case creator or a Team member with access.

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

Creating Cases
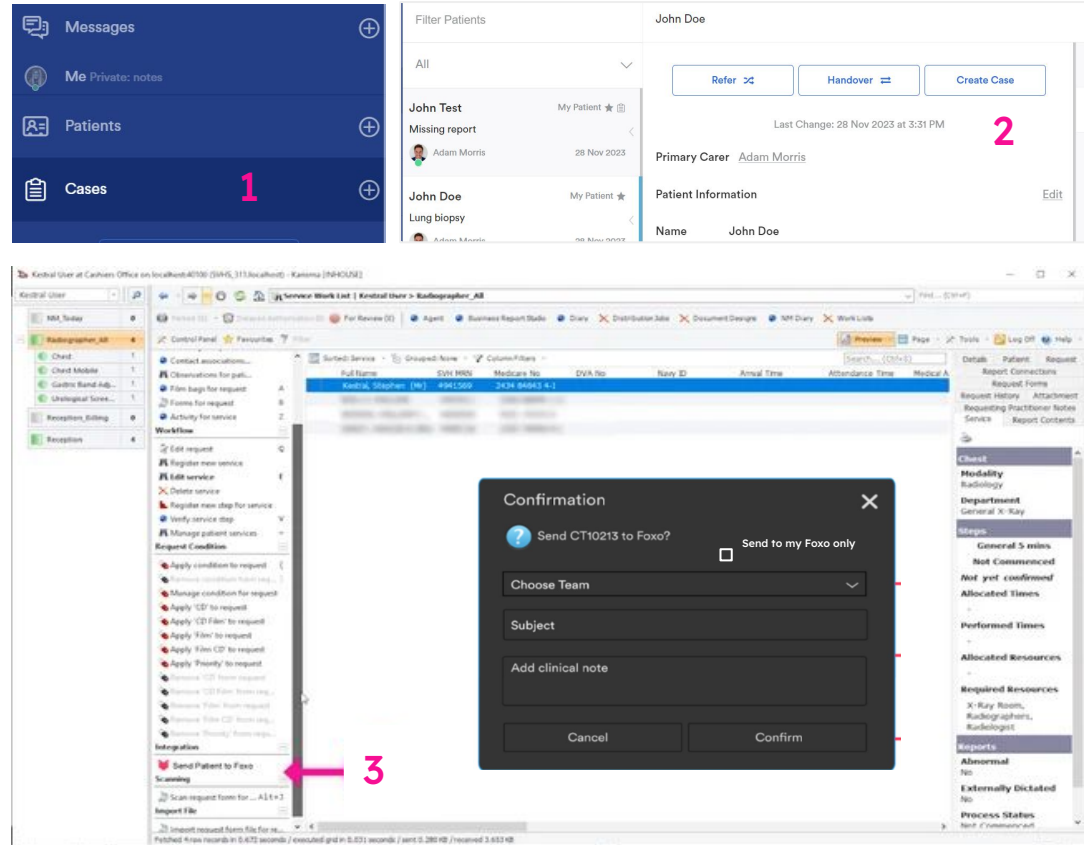
- Manually
- Via integration

🚀 **Case Creation**

There are three different ways to create a Case:

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.

Creating a Case in Foxo manually (2)

5.   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**

6.   Add reports, scans, images or other files via the **Attach Media** button

7.   Once done, click **Submit Case**.

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

With Accession selected, user can 'Send Study' to Foxo

Send Study

Right-click on Accession to reveal 'Send Study'

John   Doe   Accession 34534624

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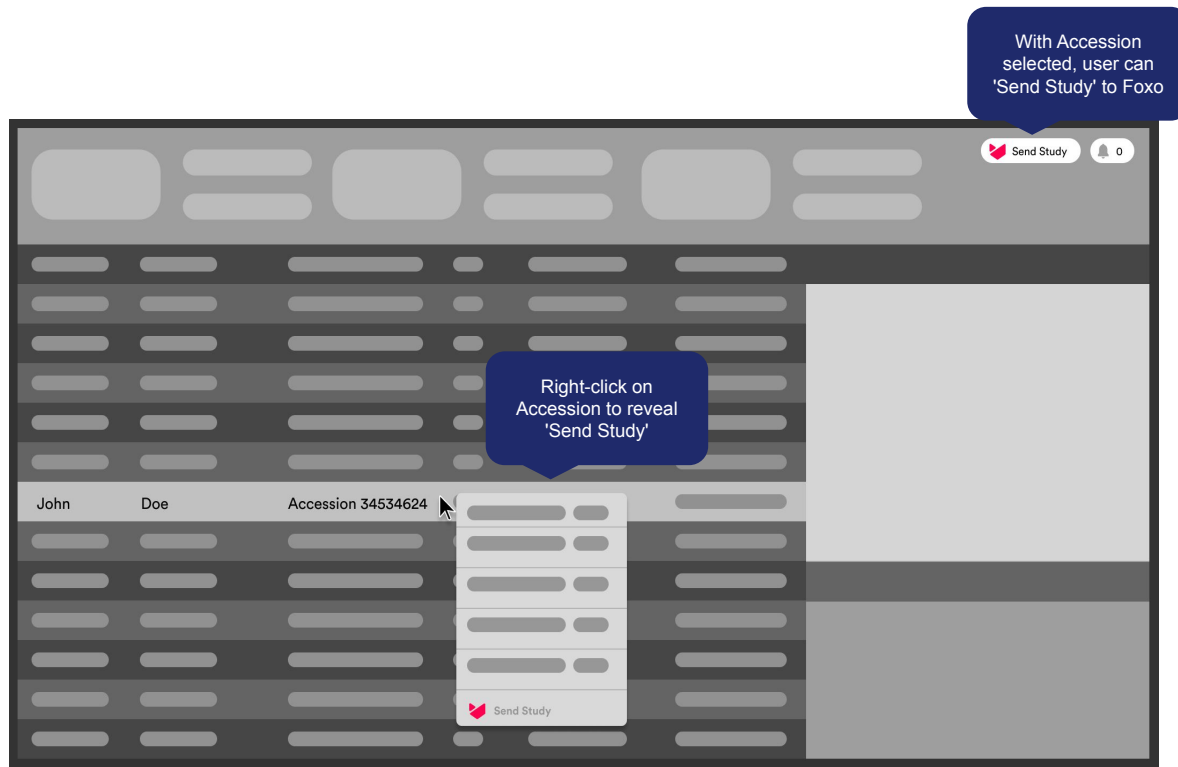
In your clinical system, look out for the 'Send to Foxo' icon.

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

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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   **3***   **2**   **1**

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

1

Send To Me: Creates Patient Card only under your Patient

Selected Study

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.
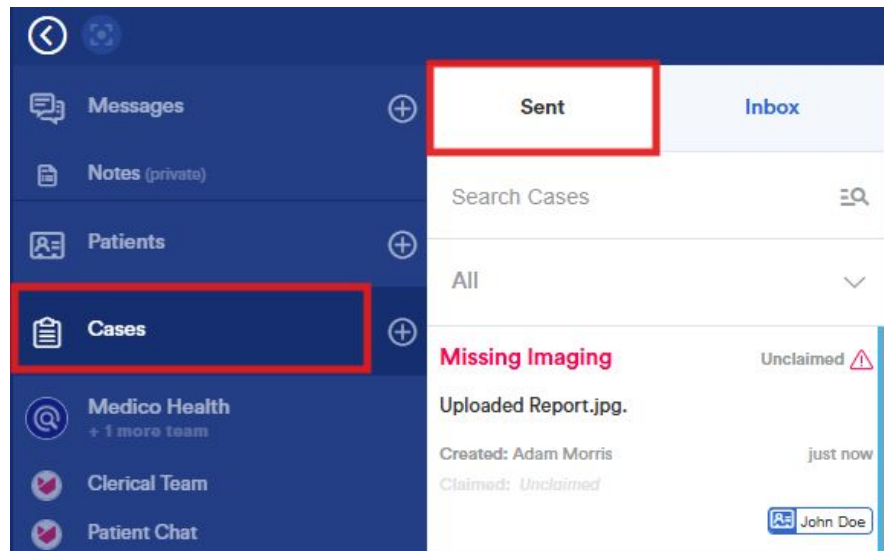
Receiving Cases

- 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.
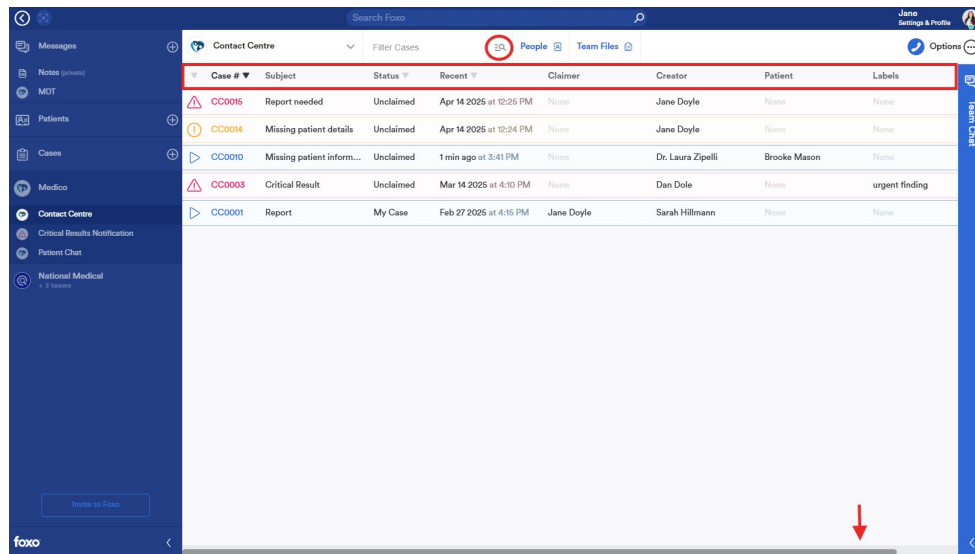
👇 **Claiming Cases**

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

People

Files

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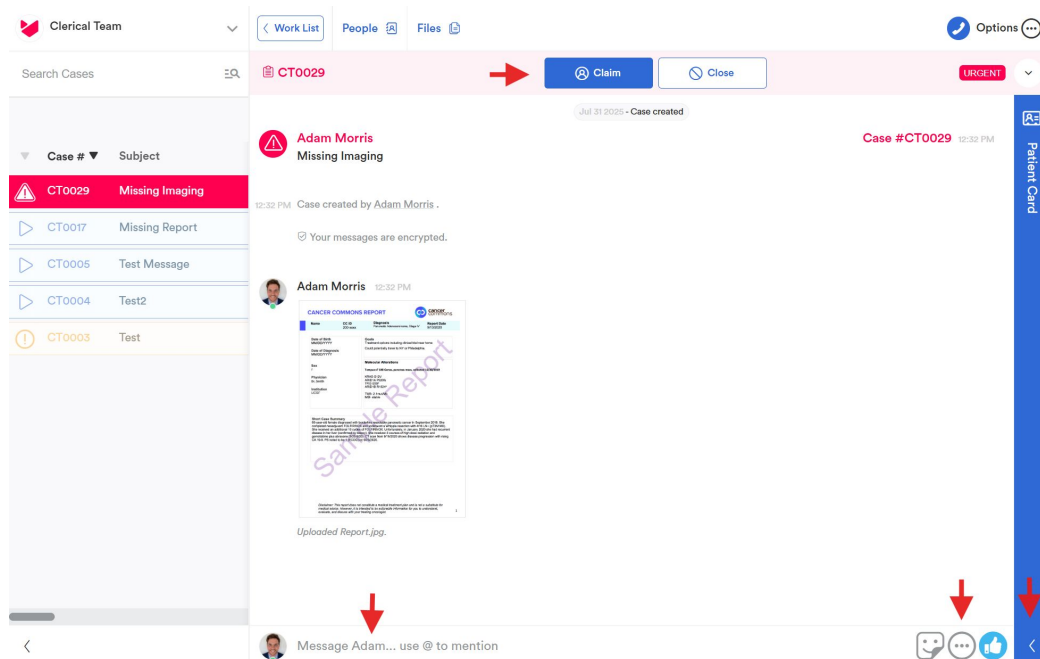
Options
- Print Case as PDF
- Team Settings (admins)
- Manage Team Notifications

CT0029

Case ID

Mark Complete

Abandon

Close

URGENT CLAIMED

Expand
To access more information

12:32 PM Case created by Adam Morris .

☑ Your messages are encrypted.

Actions

Adam Morris 12:32 PM

CANCER COMMONS REPORT

Sample Report

Uploaded Report.jpg.

Patient Card

Sarah Test 12:41 PM

Hi Adam! Looking into this now.

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

Three dots
Forward Case, add media or record audio

Case Chat & Activity Log
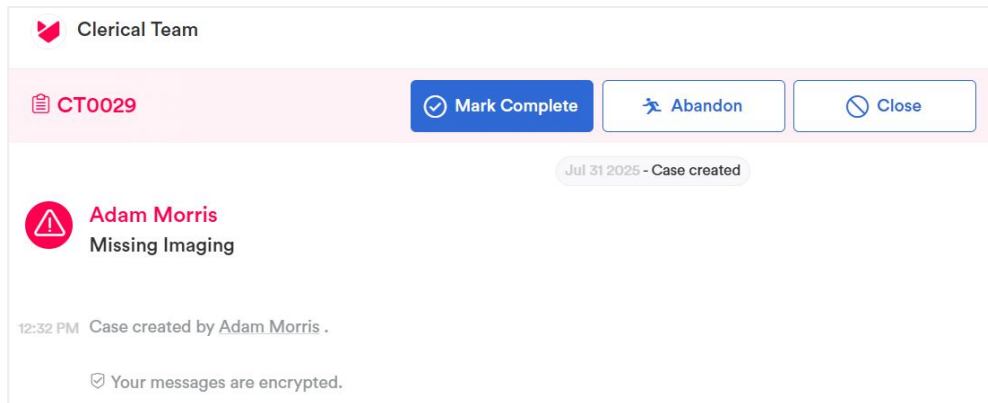
Message Adam... use @ to mention

Patient Card

foxo.com

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

👇 **Triaging Cases**

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

👇 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.

👇 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.

👇 **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.

Help Hub

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