

Intouch Insight

Case Workflow



Cases are automatically created when a record that meets the criteria specified in a **trigger** is submitted.

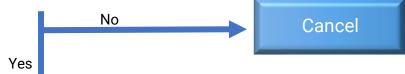
Cases can also be created <u>manually</u>, from an <u>Individual</u> <u>Record Report</u> or from the <u>Case Management list</u> in IQ.



The case can then be viewed in the list of **open** cases on the Case Management page in IQ.

From there, it can be viewed, assigned, etc.

The open case is reviewed to determine if any action is required.



If a case was created in error or is no longer relevant, it should be <u>canceled</u>.

When action is required, the case should be <u>assigned</u> to someone so that it can be resolved.

When a case is assigned:

- A due date can be set
- Comment and/or photos can be added
- A priority can be set
- Tags can be added
- A notification is sent to the assignee

After the assignee has taken the necessary action to resolve the issue they should change the case status to <u>resolved</u>.

When a case is resolved:

- Comment and/or photos can be added
- A notification is sent to the assigner