Intouch Insight
Case Workflow

Case created

Cases are automatically created when a record that meets the criteria specified in a trigger is submitted.
Cases can also be created manually, from an Individual Record Report or from the Case Management list 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.

Review

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

Action required?

No → **Cancel**

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

Yes → **Assign**

When action is required, the case should be assigned 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

Resolve

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

When a case is resolved:

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