

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 providing missing patient information or to schedule an appointment for a patient.
- 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



1. Case Creation

The Case creator initiates a Case and sends it to a Team or an individual.

Cases can also be sent to multiple Teams or individuals.



2. Case Assignment

A member of the Team or the assigned individual claims the Case.

Cases can be shared with other Teams or individuals for support.



3. Case Resolution

The assigned Team member or individual takes action to resolve the Case.

Even after a Case is claimed, another Team member can take over if needed.



4. Case Closure

Once resolved, the Case claimer closes the Case to mark it as complete.

The Case is then moved to the "Closed" section in the Case list.



5. Case Reopen (if applicable)

If further action is needed, the Case can be reopened by the creator or any Team member with access.

Creating Cases

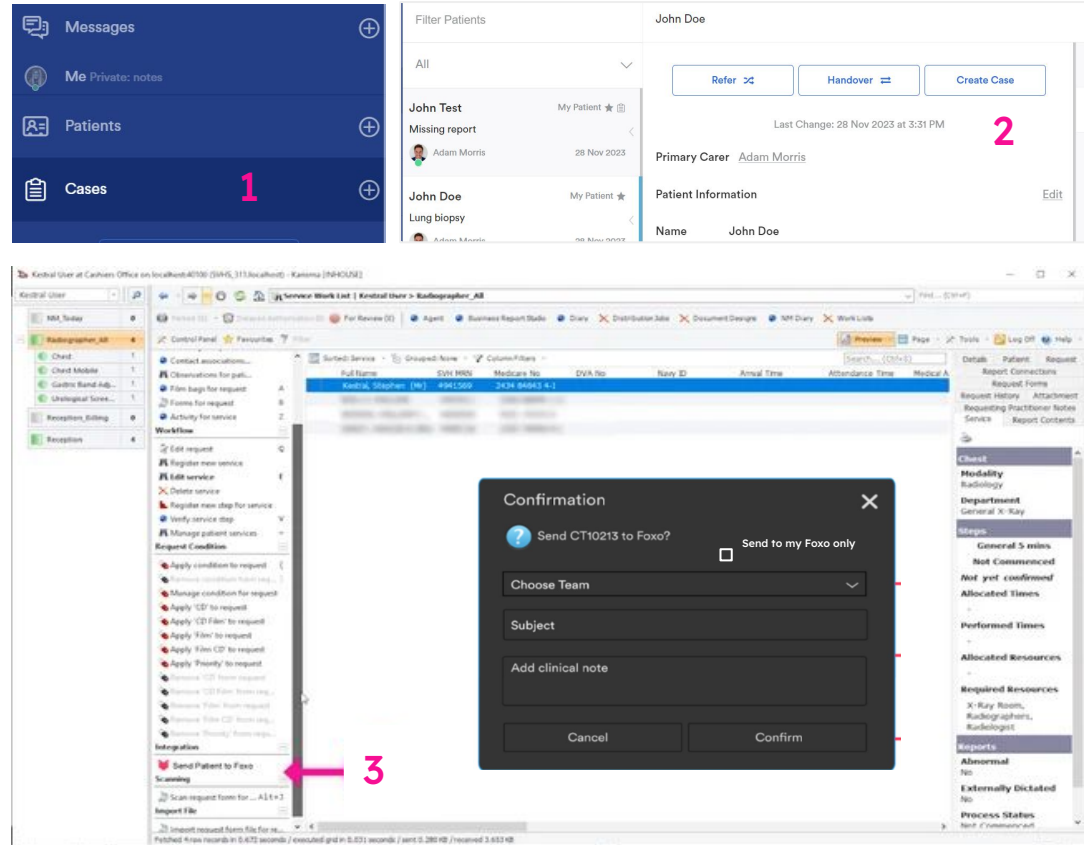


- Manually
- Via integration



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** (+)**: A screenshot of the main navigation menu on the left side of the interface. The 'Cases' option, represented by a document icon, is highlighted with a red number '1'.
- From a **Patient Card****: A screenshot of a patient's profile page for 'John Doe'. The 'Create Case' button is highlighted with a red number '2'.
- From a clinical system if an **integration** is set up**: A screenshot of a clinical system interface showing a list of patients. A red arrow points to the 'Send Patient to Foxo' option in the 'Integration' section of the sidebar, which is highlighted with a red number '3'. A confirmation dialog box is also shown, asking 'Send CT10213 to Foxo?' with options to 'Choose Team', 'Subject', and 'Add clinical note'.

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**.



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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

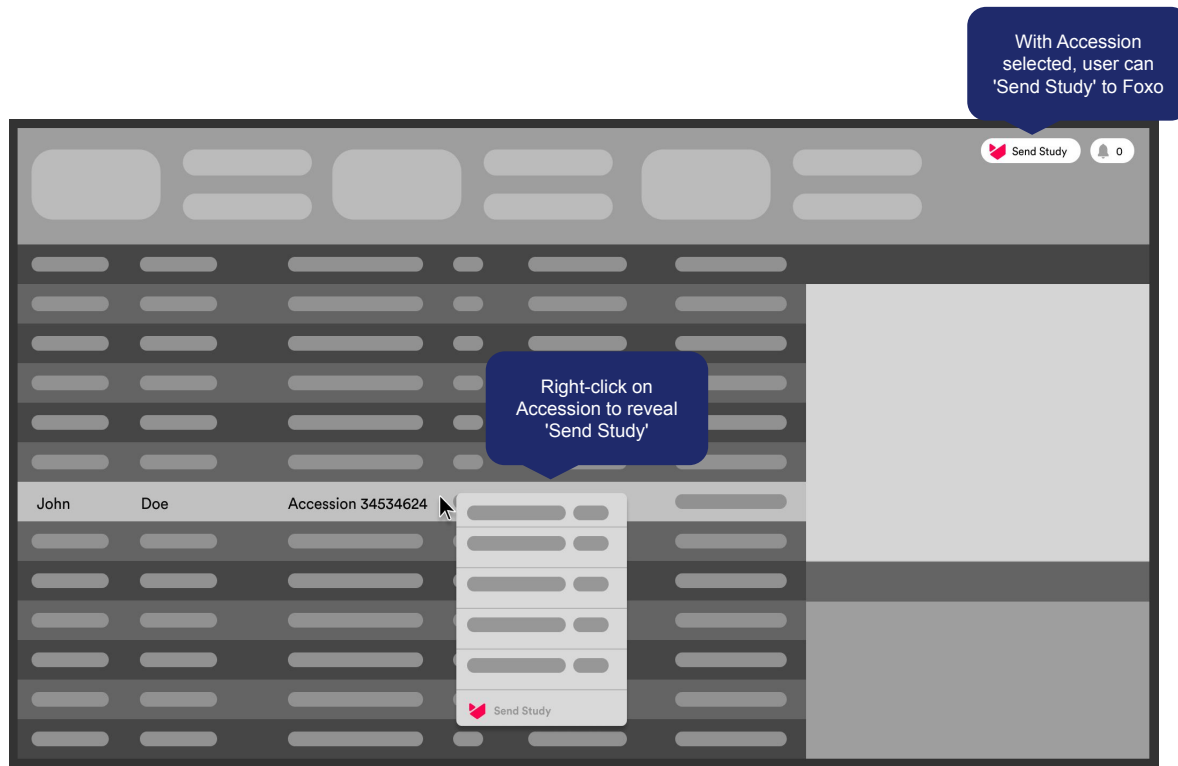
High

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 / To Me:** 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 3* 2 1 X

To Anyone


Send to Team


To me

 Dr. Gary Wood
0437 925 888 

Subject eg. Critical Result ▼

Body Message

 John Doe X

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

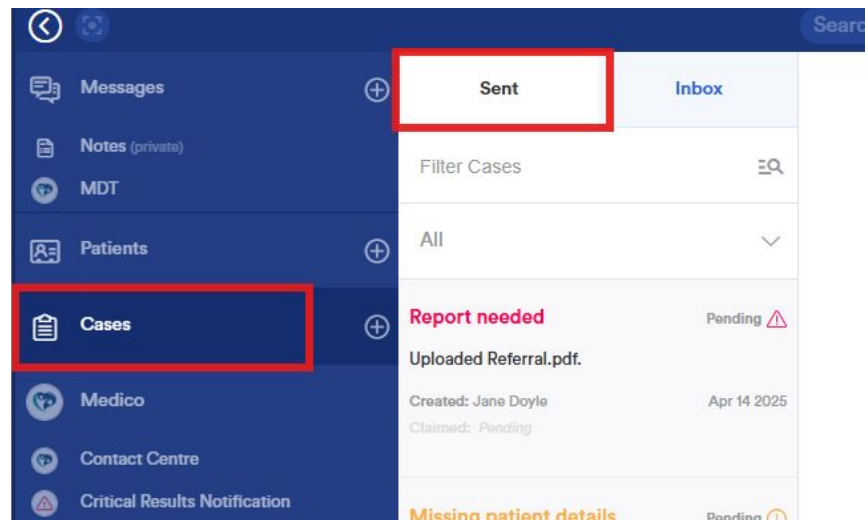
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Once your Case has been created, you'll find it Foxo under your "Sent Cases"

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



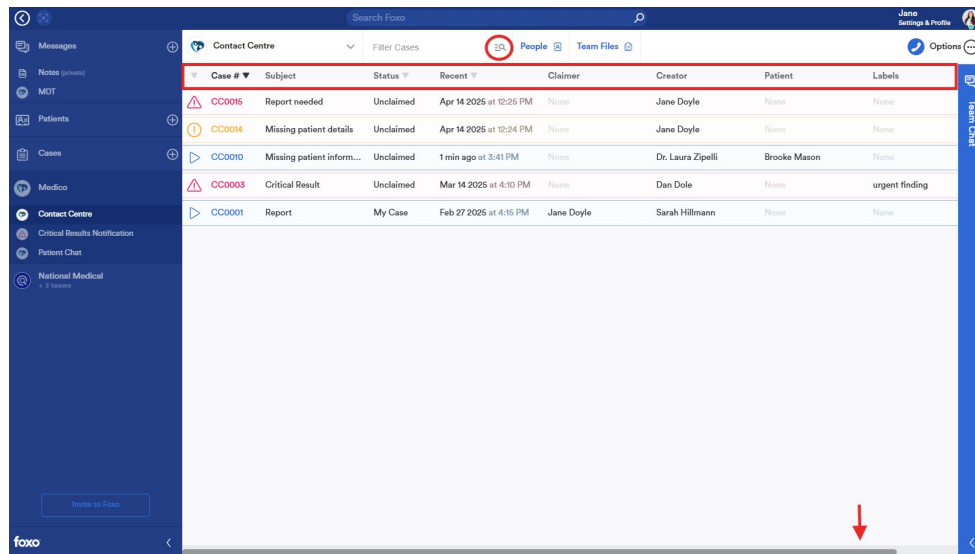
- Via a Team
- As a Direct Case



👉 Receiving Cases via a Team (Powerlist)

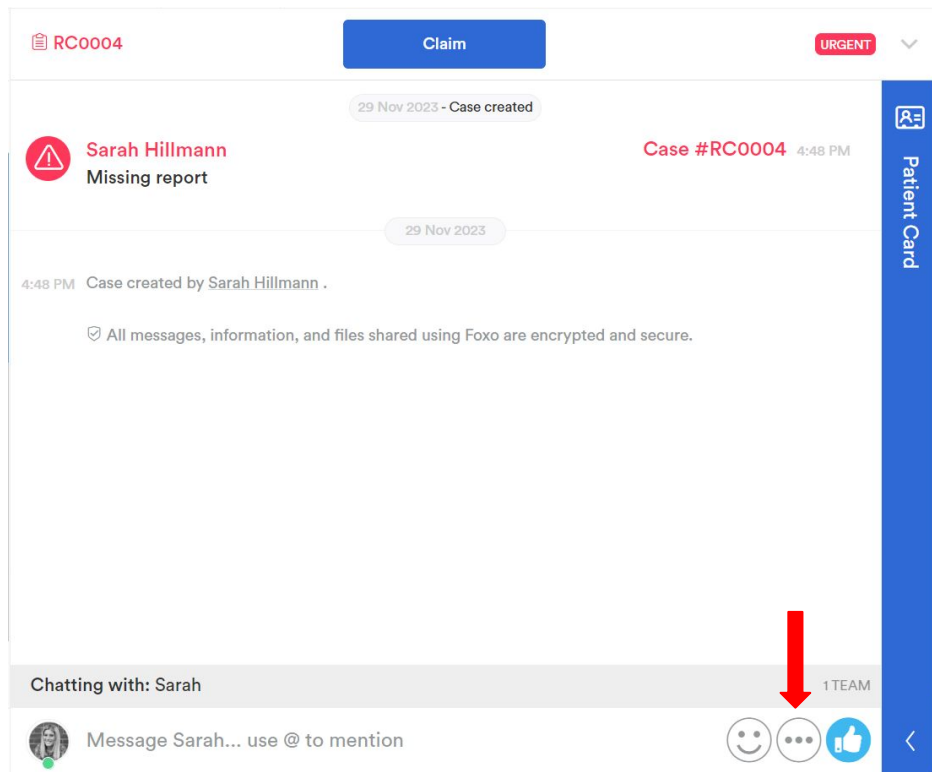
1. Navigate to the Team that received the Case and go to the Case inbox or Powerlist.
2. You can filter based on status or label or sort on most recent or status.
3. Click on the Case to open it

💡 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.



[illegible]

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

The screenshot shows the Foxo interface with a sidebar on the left containing navigation options: Messages, Notes (private), MDT, Patients, Cases, Medico, Contact Centre, Critical Results Notification, Patient Chat, and National Medical. The 'Cases' section is expanded, showing a list of filters: All, My Cases, Sent to Me, and Closed. The 'Inbox' tab is highlighted with a red box. A red arrow points to the 'All' filter. The main content area displays a list of cases, including a 'Critical Result' case from Dan Dole.

Case ID	Created By	Claimed By	Status	Message
ITJ0002	Dan Dole	Pending	Unclaimed	Critical Result Pls contact referring doctor
ITJ0004	Dr. Laura Zipelli	Jane Doyle	Unclaimed	Case created by Dan Dole .
ITJ0002	Dan Dole	Pending	Unclaimed	Pls contact referring doctor
ITJ0002	Sarah Test	Mar 03 2025	Unclaimed	Missing patient details Please update asap

👉 Triaging Cases

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

The screenshot displays a user interface for managing a case titled 'Jane Doyle' (ID: ITJ0004). The interface includes a header with 'Close' and 'Abandon' buttons, and a status 'CLAIMED'. The main area shows a message history with timestamps and actions. A red arrow points to a 'Share Case' button in the bottom right corner of the message history area. The right sidebar contains patient information and clinical notes.

Case Details:

- Case ID: ITJ0004
- Status: CLAIMED
- Primary Carer: Dr. Laura Zipelli
- Patient Name: Susan Sarandon
- Gender: Female
- DOB: Dec 12 1966
- Mobile: 04859655
- Phone: [Redacted]
- Address: 12 Walsh St, BRISBANE 4001 QLD AU
- Accession: ID456789
- Study_URL: cloudpacs.com.au
- Study_Nr: 456789

Message History:

- Feb 27 2025 - Case created
- 5:33 PM Case created by Dr. Laura Zipelli.
- Feb 27 2025
- 3:27 PM Jane Doyle has claimed this case.
- Jane Doyle 3:28 PM: Hi Dr Laura! This is done.
- Jane Doyle 3:40 PM: [PDF: Referral.pdf]
- Uploaded Referral.pdf.

Actions:

- Share Case (highlighted with a red arrow)
- Share Media
- 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.

📄 R0002 Close Abandon CLAIMED HIGH ▼

16 Aug 2022 - Case created

 **Adam Morris**
Advice needed
Please see patient results Case #R0002 2:54 PM

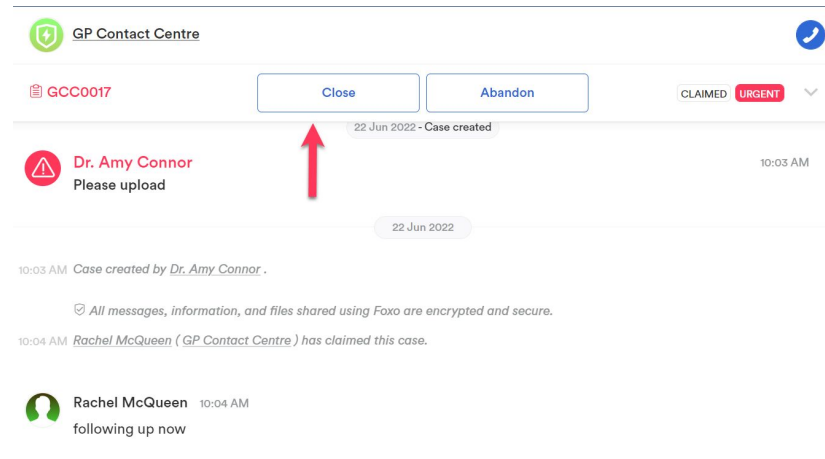
16 Aug 2022

2:54 PM Case created by Adam Morris .

🔒 All messages, information, and files shared using Foxo are encrypted and secure.

👉 Closing Cases

1. Once the Case has been actioned, you can close the Case.
2. The Case then moves to the Closed section.
3. Anyone with access to the Case (Team members or the Case creator) will have the option to reopen it if further information or assistance is needed.



Help Hub

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 foxo.com/ios

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