



Managing Cases

Adding a new case:

1. Login and click on Manage Cases in the navigation bar at the top.
2. Click on Add New Case.
3. Your information will populate at the top as the Key Contact.
4. Complete the form thoroughly, without entering any private health information. Cases are automatically assigned a unique ID.
5. Once you Save the case it will be added to the dashboard in The Hub.
6. All users within an organization can share and manage cases. You can edit cases by clicking on Manage Cases or through The Hub.

Reviewing cases:

1. Click on The Hub in the navigation bar at the top.
2. You can preview high level information of all cases from the dashboard and see which have matches and connections.

Matches: Organizations automatically “match” to a submitted case based upon the Organization Case Preferences which are set by their Administrator. These preferences can be changed at any time, and matching to a case does not require the organization to accept the case.

Connections: Any user can “connect” to a case in The Hub by clicking on View Case and then click “connect” at the bottom. This notifies the community that your organization is reviewing the case. Connecting to a case does not require the organization to accept the case.

3. Click on View Case to see all the information submitted for the case, including the admission date and contact information of the submitter. The case submitter can edit information in this view, and all others can either connect or accept the case.

Closing cases:

1. Users can close cases that they have added, or the cases that users within their organization have added.
2. Go to either Manage Cases or The Hub and click on that case. Change the case status to “closed”. This will remove the case from The Hub and it will no longer be viewable by other users.