

Update a Case

Step	Action
1	Click the Notes tab to begin the procedure.
2	Select the Subject text box and enter a short, descriptive title.
3	Click the Details text box and enter as much specific information as possible.
4	Click the Apply Note button, once you have finished typing the note.
5	Click the Save button to ensure the updates to the case are saved.
6	Click the Notify button to send an internal communication.
7	Click the appropriate check box for the customer and/or provider group.
8	To select another provider group, simply click the Select Provider Group button.
9	In the Provider Group text box enter as much of the provider group name or ID as possible.
10	Click the Search button.
11	Click the To check box for the appropriate Provider Group from the search results.
12	Click the Add Selected to Recipient List button.
13	Click the Email Template drop down menu to choose a template.
14	Click the Apply Template button.
15	When finished adding or editing any information in the message, click the Send button.
16	Click the Email button to communicate externally with the customer.
17	Click the Add/Modify Recipient List link to add more recipients to the email.
18	Click the First Name and Last Name text boxes and enter as much of each as possible in the search fields.
19	Click the Search button.
20	Select the appropriate recipient from the search results. Check the box associated with either the To , CC , or BCC field.
21	Click the Add to Recipient List button to add the email address to the recipient list.
22	When finished adding recipients, click the OK button.
23	Click the Template drop down menu to select the most appropriate email template for your internal communication.
24	Click the Apply Template button.
25	When finished adding or editing any information in the message, click the Send button.
26	When prompted to enter a note, click the No button.