Case Templates

Contents

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Chapter 1

Overview

Topics:

About Case Templates

Case Templates allow you to create and use templates that can be used to auto-fill information that would normally be entered manually in the Case Details page.

You can search the case templates, and select a template from the list to view or edit. For common use cases, you can create a template that specifies values you will use in new or existing cases. For instance, if you perceive that certain symptoms have a specific issue, you can enter the symptoms, diagnosis, and recommendation that correspond with the specific issue, then apply the case template when those symptoms appear in a case, saving you time.

While creating a case template, you can use the Configure Sections drop-down list to select additional sections. Sections not currently in the case will appear when you apply the case template.

Once a case template has been saved, you can edit it to change values that apply to the common uses for the case type for which it is intended.

Applying a case template overwrites some or all of the values existing in a case. You then have an opportunity to edit the case to account for divergence from the case template.

Chapter 2

Manage Case Templates

Topics:

Create, Modify, or Delete a Case Template

You can use case templates to add reusable information about a case to a new or existing case.

Before You Begin

When creating a new case template, make sure that the case template does not already exist by searching or scrolling through the available templates in the case templates list. If you attempt to create a new case template with the same name as an existing case template, the following error message will appear: "`A case template with that name already exists. Please choose a different name.`"

About This Task

You can modify an existing case template, or create a new one. The case templates list displays all sections included with the selected template.

Procedure

- To create a case template:
  1. In the **Applications** menu, navigate to the **HEALTH** section, and then select **Case Templates**. Case Templates opens in a new tab.
  2. Select the **Add** icon ( ).
     The **Case Templates** page appears in edit mode.
  3. Use the case template options to add template details in the **Interpretation** section.

For this option	Do this
Case Template Name field	Enter a unique Template Name.
Category drop-down	Select the issue from the list.
Likelihood drop-down	Select how likely the issue is to occur.
Urgency drop-down	Select how quickly the issue needs to be resolved.
Symptoms field	Enter the symptoms that caused the alert for the case into the Symptoms field.
Diagnosis field	Enter the apparent cause of the alert and any supporting information into the Diagnosis field.
Recommendation field	Enter the recommended actions to take and any supporting information into the Recommendation field.

  4. Select **Configure Sections** to add a custom section. See the topic "Configuring a Case Template" for more information.
  5. Select **Save**.
     The new template is added to the Case Template list.
- To modify the attributes of an existing case template:
  1. In the **Applications** menu, navigate to the **HEALTH** section, and then select **Case Templates**. Case Templates opens in a new tab.
  2. In the **Case Template** list, select the **Search** icon ( ) to expose the **Search** field. Enter at least three characters and select **Enter** to narrow the list.

     To return to the full case template list, select the **X** next to the **Search** field.

3. Select the specified template name.
   The **Case Template Edit** page appears.
4. Modify the template details, and then select **Save**.
   The changed values in the template are saved.

- To delete a selected case template:
  1. In the **Applications** menu, navigate to the **HEALTH** section, and then select **Case Templates**.
     Case Templates opens in a new tab.
  2. In the **Case Templates** page, select an existing case template.
     The **Case Template Edit** page appears.
  3. Select **Delete Template**.

     Note:

     Deleting a case template does not affect cases where the case template was previously used.

     In addition, if the selected case template is associated with an alert template, a message appears, notifying you that the template cannot be deleted as it is associated with one or more alert templates.

Configure a Case Template

You can configure an existing case template or configure a newly created one.

Before You Begin

You must have permissions to access and modify templates.

About This Task

You can create a new case template and then configure the sections, or configure an existing case template. The following sections are locked and are automatically added to the new template. In addition, they are designated with a padlock icon in the Configure Sections dialog box:

- Interpretation
- Closure
- Analysis
- Actions
- Evidence
- Similar Cases
- Notes
- Recommendations
- Work History

Note: Recommendations and Work History are not available in Legacy Predix Essentials.

Procedure

1. In the **Applications** menu, navigate to the **HEALTH** section, and then select **Case Templates**.
   The Case Templates page opens in a new tab.
2. In the Case Templates screen, do one of the following:
   - Select an existing Case Template from the list.
   - Select the **Add** icon () in the upper-right corner of the page.

   The template appears. For new templates, only the Interpretation section is displayed.

Note: If this is a new template, you must enter a name for the template in the name field at the top of the screen. Once you have done this, the **Save** button is activated.

3. Select **Configure Sections**.
   The **Configure Sections** dialog box appears.
4. Select the section or sections that you want to add.
   Each added section is given a check mark.
5. Select **Apply**.
   The dialog box closes and the newly added sections appear in the template.
6. Select **Save** to save the changes.
7. **Optional:** To remove a section, do the following:

   a) Select **Configure Sections**.
   b) Select the checked section you want to remove.
   c) Select **Apply**.
   d) Select **Save**.
      Your changes are saved.

Sort and Filter Columns in the Case Template Grid

You can sort and filter the list of templates using a column to retrieve the specific required template matching the sorting order and filtering criteria.

Before You Begin

You must have permissions to access and modify templates.

Procedure

- To sort a column in the Case Templates grid view:

  1. In the **Applications** menu, navigate to the **HEALTH** section, and then select **Case Templates**.
  2. Select a column header, such as **Severity**.
     The data in the column is sorted either in the ascending or descending order, respectively. To reverse the order, select the column header again.

     Note:

     ◦ Columns are sorted alphanumerically, first by symbols, then number, and then uppercase and lowercase letter.
     ◦ The columns remain sorted in the same order even when you access the details page of a case template, and then navigate back to the Case Templates grid.
- To filter a column in the Case Templates grid view:

  1. In the **Filter** text box below the column header, enter the term with which the column is filtered.

     Note: As soon as you type three characters, the column begins to filter the entries. As you continue to type the characters, the column continues to filter the entries, narrowing down the results.

     To find all entries with the Closed Status, enter `Clo` in the Filter text box for the Status column, and then press Enter.
     The column is filtered, showing all entries with status Closed.

     Note:

     ◦ The filters applied to the columns in the Case Templates grid are persistent even when you access the details page of a case template, and then navigate back to the Case Templates grid.

    - Sorting of a column is not affected by the filtering criteria. For example, if you sort the grid by the Name column, and then filter by Name and ID, the sort order will remain the same.

Show or Hide Columns in Case Templates

You can show or hide one or more columns in a Case Template.

Before You Begin

You must have permissions to access and modify the templates.

Procedure

- To show a column in the Case Templates grid view:
    1. In the **Applications** menu, navigate to the **HEALTH** section, and then select **Case Templates**.
    2. Select **Hide/Show Columns**, and then select the check box for each column names that you want the grid to display.
       The selected columns appear in the grid. By default, all column names are selected.
- To hide a column in a Case Template, select **Hide/Show Columns**, and then clear the check box for each column name that you want the grid to hide.
  The selected columns do not appear in the grid.

Apply a Case Template to a Case

You can select and apply a case template to a specific case.

About This Task

Case templates contain values that can be applied to a case. You can apply multiple templates to a case. Any applicable values are overwritten by the last template applied.

Procedure

1. In the **Applications** menu, navigate to the **HEALTH** section, and then select **Case Templates**.
2. Select a case from the list.
3. In the Case Details page, select the **List** icon ( ), and select **Apply Template**.
4. In the **Select a Case Template** dialog box, enter at least three characters into the **Search** field.
   The list of case templates narrows as you enter text.
5. Select a template from the list.
   A message appears indicating that certain sections are overwritten by this action.
6. Select **Apply**.
   The content contained in the template is applied to the case.

   Note: You can modify the content values after applying a template.

Chapter 3

Reference

Topics:

Field Descriptions

Case Template

The following table describes the fields that are available in the details page for a case template:

Field	Description
Case Template Name	The unique name of the case template.
Category	The category of the issue.
Likelihood	How likely the issue is to occur.
Urgency	How quickly the issue needs to be resolved.
Symptoms	The symptoms that caused the alert for the case.
Diagnosis	The apparent cause of the alert and any supporting information.
Recommendation	The recommended actions to take and any supporting information.

Chapter 4

Release Notes

Topics:

Fourth Quarter of 2023

Release Date: December 13, 2023

This topic provides a list of product changes released for this module on this date.

Table 1: Enhancements and New Features

The following enhancements and new features have been added.

Description	Tracking ID
To enhance user experience and improve the design, new versions of Alert Templates and Case Templates have been introduced, which maintain functional parity with the older versions.	US610471

Fourth Quarter of 2020

Release Date: December 11, 2020

This topic provides a list of product changes released for this module on this date.

Table 2: Enhancements and New Features

The following enhancements and new features have been added.

Description	Tracking ID
The Case Templates grid has been enhanced to retain the sorting order and filter criteria even when you access the details page of a Case Template and then navigate back to the Case Templates grid.	US445890

Second Quarter of 2020

Release Date: June 26, 2020

This topic provides a list of product changes released for this module on this date.

Table 3: Resolved Issues

The following issues, which existed in one or more previous versions, have been resolved.

Description	Tracking ID
Previously, when you deleted an Alert Template, and then attempted to delete a Case Template that was associated with the Alert Template, the deletion failed and an error message indicating that the Case Template was still associated with an Alert Template appeared. This issue occurred even though the Case Template was not associated with any other Alert Template. This issue has been resolved.	DE114708