

# Monitoring a Case in Progress

1 A Case in Progress is represented by two grey gears.

The screenshot shows the INFINX dashboard with the 'Current' tab selected. At the top, there are six summary cards: Pending Today (0), Pending Tomorrow (0), Action Needed Today (0), Action Needed Tomorrow (0), Cases Received Today (0), and Cases Completed Today (0). Below this is the 'List of Current Cases' section, which includes a search bar and filter buttons for 'Status: Case Received', 'Status: In-Progress', and 'Status: Action Required'. The main table lists cases with columns for Case ID, Appointment Number, Patient Name, Date of Birth, Date of Service, Procedures, Notifications, Insurance Company, Case Status, and Options. A yellow box highlights the 'Case Status' column for the second case, 'Brady May', which shows two grey gears. A legend next to it lists the status options: Case Received (green circle), Case In Progress (red circle with two grey gears), Action Required (green circle), Case Completed (green checkmark), and Case Canceled (red circle with slash).

Case ID	Appointment Number	Patient Name	Date of Birth	Date of Service	Procedures	Notifications	Insurance Company	Case Status	Options
demo-142	9988887654	Brent Brown	08/15/2008	8/15/2019 12:00:00 AM	2	0	CIGNA	⚙️	⋮
demo-141	3344556789	Brady May	08/29/2009	8/3/2019 12:00:00 AM	1	1	Cinna Onen Acc	⚙️	⋮
demo-140	5544441122	Jonathan Searcy	08/05/2000	8/24/2019 12:00:00 AM	2	1		⚙️	⋮
demo-139	22331212	Brent West	08/12/2000	8/30/2019 12:00:00 AM	3	0		📧	⋮

2 The case status will immediately change to a green checkmark once a payer's pre authorization decision has been made. It now says Case Completed.

The screenshot shows the INFINX dashboard with the 'Completed' tab selected. The summary cards at the top are identical to the previous screenshot. The 'List of Completed Cases' section is active, with filter buttons for 'Status: Completed' and 'Status: Canceled'. The main table lists completed cases. A yellow box highlights the 'Case Status' column for the first two cases, 'Rohit Sharma' and 'Narendra Modi', which show a green checkmark. The legend next to it lists the status options: Case Received (green circle), Case In Progress (red circle with two grey gears), Action Required (green circle), Case Completed (green checkmark), and Case Canceled (red circle with slash).

Case ID	Appointment Number	Patient Name	Date of Birth	Date of Service	Procedures	Notification	Insurance Company	Case Status	Options
demo-114	117386	Rohit Sharma	07/09/2011	7/25/2019 12:00:00 AM	1	6		✓	⋮
demo-113	109473	Narendra Modi	06/25/2000	7/5/2019 12:00:00 AM	1	0		✓	⋮
demo-112	89839809	Thomas Musberger	01/30/2018	5/1/2019 12:00:00 AM	1	0	HDFC	⊘	⋮

- Click on the case. Scroll to the Active Procedures section. The status will now say Authorized, Denied, or No Authorization required.

**Active Procedures**

Procedure #1 - 72458

Modifier	Insurance	Insurance Type	Status
-/-	CIGNA	PRIMARY	Authorized
Effective Date	Expiry Date	Authorization Number	
07/09/2019	07/25/2019	12345	
Notification	Commented By	Commented On	
		7/8/2019 11:49:20 PM	
Called insurance	OM Admin		
Case marked peer to peer	OM Admin	7/8/2019 11:49:35 PM	
Authorised	OM Admin	7/8/2019 11:51:53 PM	

- If Authorized, it will give you the Authorization Number, its Effective Date and Expiry Date.

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Authorised	OM Admin	7/8/2019 11:51:53 PM	

- To sort through cases quickly, you can filter by status, insurance company or date of service.

**INFINX** Current Completed Draft Lora

0 Pending Today 0 Pending Tomorrow 1 Action Required 1 Peer To Peer 0 Finalized Today 1 Sent Today

**List of Current Cases** Showing 10 cases per List + New Case Case Id/Appointment No./Patient Name

Filters: Status: Case Received x Status: In-Progress x Status: Action Required x Status: Finalized x Reset Filters

Case ID	Appointment Number	Patient Name	Date of Birth	Date of Service	Procedures	Notifications	Insurance Company	Case Status	Options
demo-160	153942	Reggie Rodgers	11/07/1952	10/31/2019 12:00:00 AM	2	0	CIGNA	⚙️	⋮
demo-159	153991	Kerry rogers	10/29/1993	11/22/2019 12:00:00 AM	1	0	UHC	✉️	⋮
demo-150	54978	Kelly Fowler	08/10/1998	12/19/2018 8:05:00 AM	1	3	ANTHEM	⚠️	⋮
demo-144	111121	Mary alders	09/12/1996	9/12/2019 12:00:00 AM	1	4	COVENTRY HEALTH CARE	✅	⋮

6 Use the search function if you have the case ID, appointment number or patient name.

The screenshot displays the INFINX software interface. At the top, there are navigation tabs for 'Current', 'Completed', and 'Draft'. A user profile 'Lora' is visible in the top right. Below the tabs, a summary bar shows statistics: 0 Pending Today, 0 Pending Tomorrow, 1 Action Required, 1 Peer To Peer, 0 Finalized Today, and 1 Sent Today. A search bar is located below the summary, with a '+ New Case' button and a search input field. Below the search bar, there are filter tabs for 'Status: Case Received', 'Status: In-Progress', 'Status: Action Required', and 'Status: Finalized', along with a 'Reset Filters' button. The main content is a table titled 'List of Current Cases' with the following columns: Case ID, Appointment Number, Patient Name, Date of Birth, Date of Service, Procedures, Notifications, Insurance Company, Case Status, and Options. The table contains four rows of data.

Case ID	Appointment Number	Patient Name	Date of Birth	Date of Service	Procedures	Notifications	Insurance Company	Case Status	Options
demo-160	153942	Reggie Rodgers	11/07/1952	10/31/2019 12:00:00 AM	2	0	CIGNA		...
demo-159	153991	Kerry rodgers	10/29/1993	11/22/2019 12:00:00 AM	1	0	UHC		...
demo-150	54978	Kelly Fowler	08/10/1998	12/19/2018 8:05:00 AM	1	3	ANTHEM		...
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If you have any questions, feel free to reach out to our support team at [www.infinx.com](http://www.infinx.com)