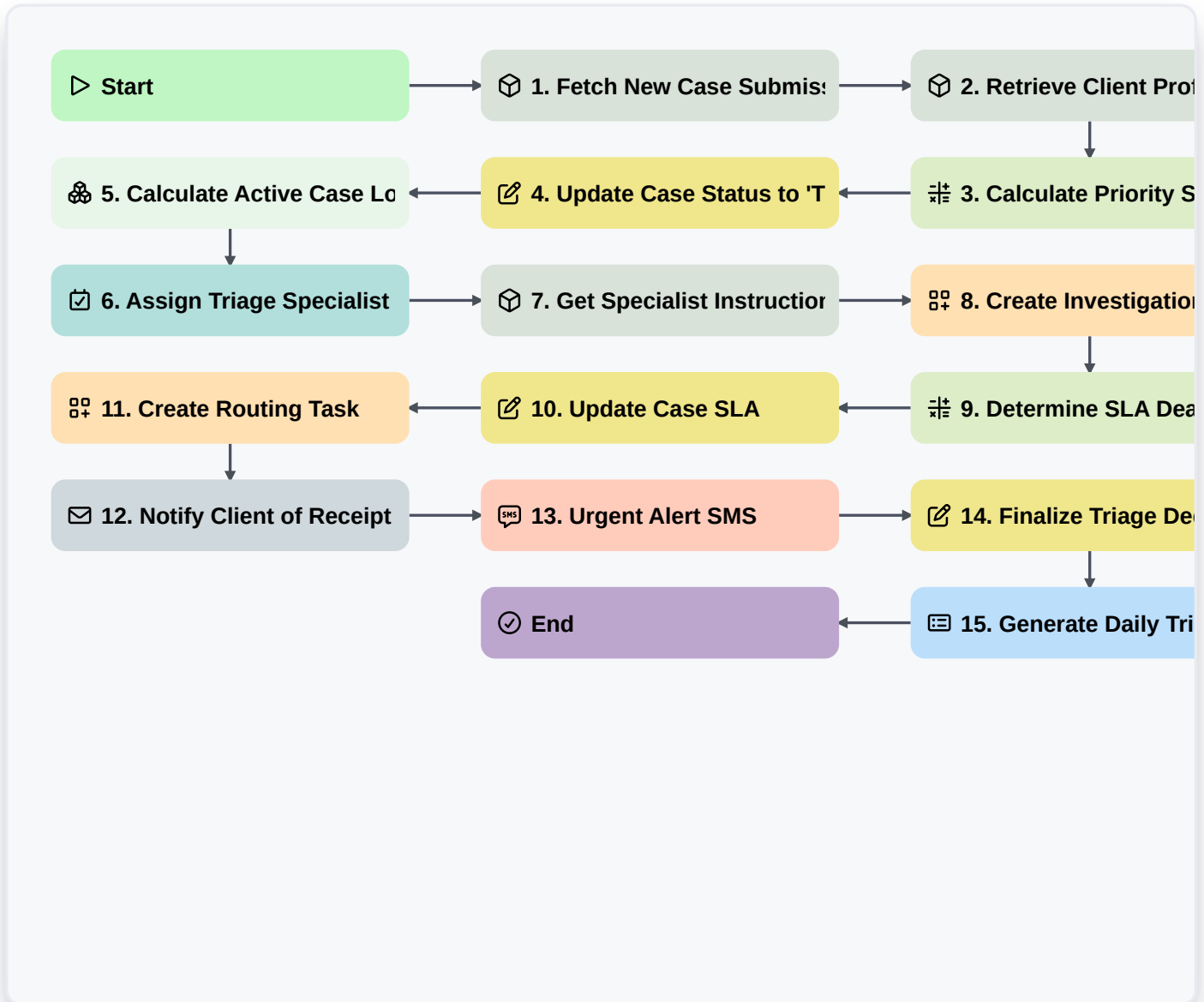


Case Intake And Triaging Workflow



▷ Start

Start of the Workflow/Process.

📦 1. Fetch New Case Submission

Retrieve the initial data entry from the Case Intake data model submitted via the intake form.

📦 2. Retrieve Client Profile

Lookup existing client information in the Client Data Model using the identifier from the intake form.

🔢 3. Calculate Priority Score

Apply a formula based on case urgency, impact, and client tier to determine the initial priority level.

✍️ 4. Update Case Status to 'Triaging'

Update the retrieved case entry status to reflect that the triage process has officially begun.

🔗 5. Calculate Active Case Load

Aggregate the count of all 'In Progress' cases assigned to the triage team to check for capacity.

📋 6. Assign Triage Specialist

Create a task for the available Triage Specialist to review the case details and verify information.



7. Get Specialist Instructions

Retrieve the standard operating procedure (SOP) or checklist instructions from the Triage Protocol model.

8. Create Investigation Record

Create a new entry in the Investigation Data Model to track the deep-dive findings during triage.

9. Determine SLA Deadline

Calculate the required response deadline based on the Priority Score and current timestamp.

10. Update Case SLA

Update the Case entry with the newly calculated deadline date.

11. Create Routing Task

Create a task for the relevant Department Head if the case is flagged as 'High Priority'.

12. Notify Client of Receipt

Send an automated email to the client confirming that their case has been received and is being reviewed.

13. Urgent Alert SMS

Send an SMS alert to the On-Call Manager if the Case Priority Score exceeds a critical threshold.

14. Finalize Triage Decision

Update the Case entry with the final triage decision (e.g., Approved, Rejected, or Escalated).

15. Generate Daily Triage Summary

Create a daily report summarizing all cases triaged, average processing time, and volume trends.

End

End of the Workflow/Process.