Third party delegation of cases – Fellows user guide

The Fellows interface has been enhanced to enable users to delegate their own Surgical Case Form’s (SCF)’s to a third party for completion. Once the delegate has completed the SCF it will be returned to the original case owner for review before it is submitted to the audit office.

1. To Delegate a SCF highlight the case to be delegated in the “Pending Surgical Case Forms” table. Then click the delegate case button.

Note: SCF’s can also be delegated after self-generating notifications of death, to see how this is done, check the Self-generated notifications of death user guide.

2. Enter the email address of the person you wish to delegate the SCF to and accept the terms and conditions.
Note: Users cannot delegate cases to other Fellows. If you believe a case has been inappropriately assigned to you and you believe it should be given to another fellow, click the Reject Case button instead.

3. If the delegate is already registered with the audit they will then receive an email prompting them to complete the SCF, if not you will be asked to confirm the email address to ensure it is going to the correct person.

4. Once a SCF has been delegated it will appear in the “Delegated Surgical Cases” table.

Note: There are four colour codes indicating a cases status:
- Purple indicates that the case has been delegated to a registered delegate and is awaiting completion.
- Red indicates that a delegate has begun completing a case but has not yet submitted it for approval.
- Green indicates that a case has been completed by a delegate and is waiting for your approval before being submitted to the audit office.
- Yellow indicates that a case has been delegated to someone who is not currently registered with the audit.

5. If a case has been delegated inappropriately you can recall the case by clicking the Recall case button. Recalled cases can be delegated to a new user.
6. When the delegate returns the SCF to you the status will change to green “Ready for submission”. Click the “View Case” button and review the SCF details. If you are happy with the details of the case click the “Submit Case” button. You will be prompted to agree that content is accurate.

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