### Email Outbound Notice from a Case - Agent

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This exercise begins from the <strong>Note (i)</strong> Tab inside an open case. <strong>NOTE:</strong> These steps can also be used when sending an email notice from the <strong>Solution</strong> tab. Select the appropriate note by checking the box under <strong>Select</strong>. For the purpose of this example, check the box next to the note named &quot;<strong>What is wrong?</strong>&quot;</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Email</strong> button.</td>
</tr>
<tr>
<td>3.</td>
<td><strong>NOTE:</strong> You can select the appropriate recipient from the list by checking next to the name under <strong>To</strong>, <strong>CC</strong> or <strong>BCC</strong> column. Adding an additional recipient is optional if a recipient is not listed. For the purpose of this example, we will add another recipient by clicking the <strong>Add Recipients</strong> link.</td>
</tr>
<tr>
<td>4.</td>
<td><strong>NOTE:</strong> You can use a combination of search criteria such as <strong>First name</strong>, <strong>Last Name</strong>, <strong>Email Address</strong>, <strong>Provider Group Name</strong> or <strong>Person ID</strong>. Enter the appropriate information into the <strong>First Name</strong> field. For the purpose of this example, enter &quot;<strong>Thomas</strong>&quot;.</td>
</tr>
<tr>
<td>5.</td>
<td>Enter the appropriate information into the <strong>Last Name</strong> field. For the purpose of this example, enter &quot;<strong>Agent</strong>&quot;.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>7.</td>
<td>Select the appropriate name from the <strong>Search Results</strong>. For the purpose of this example, select the name <strong>Thomas Agent</strong>.</td>
</tr>
<tr>
<td>8.</td>
<td>Click the <strong>Add to Recipient List</strong> button.</td>
</tr>
<tr>
<td>9.</td>
<td>Click the <strong>Apply</strong> button.</td>
</tr>
<tr>
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<td>------</td>
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</tbody>
</table>
| 10.  | Select the appropriate name from the list under **Recipients**.  
For the purpose of this example, we will check the box **Suzanne Customer** under the "To" column.  
**NOTE:** Checking the box under the column **Worklist**, send a copy of the notice in the Agent or Provider Group Worklist. |
| 11.  | Select the appropriate agent under the list of **Recipients**.  
For the purpose of this example, we will check the box **Thomas Agent** under the "To" column. |
| 12.  | Click the **Template** dropdown list.  
**NOTE:** These next three (3) steps are optional, a note can be sent without selecting a template. |
| 13.  | Select the appropriate **Template** from the list.  
For the purpose of this example, click the **FSU Need More Information** list item.  
**NOTE:** These next two (2) steps are optional, a note can be sent without selecting a template or clicking the button **Add Closing Template**. |
| 14.  | **NOTE:** This step is optional. You can add additional information to the note, if necessary. The message can still be modified after choosing a template.  
For the purpose of this example into the text field. Enter "**Have a nice day.**" |
| 15.  | Click the **Send** link. |
| 16.  | Click the **Save** button. |
| 17.  | Click the **Home** link. |
| 18.  | **Congratulations!**  
You have completed this topic  
**End of Procedure.** |