|  |  |
| --- | --- |
|  | **Case management provided** |
| User Roles and Access Controls | Head of Department (HOD): Registers cases, assigns, Coordinators, monitors progress, and approves the final report |
| **Coordinator**: Enters initial case details, assigns investigators, verifies information (e.g., PAN, Aadhar, doctor info via APIs), manages investigator work allocation, reviews case status, creates questionnaires, and handles reassessment. |
| Field Investigator: Receives assignments, collects information during site visits, completes questionnaires, uploads documents, and marks case status. |
| Medical Officer: Reviews data, assesses claim legitimacy, adds remarks, and determines the claim status. |
| Data Entry Personnel: Compiles the final report from the gathered data and medical officer remarks. Each user role has specific access permissions within the app: |
|  |
| **Login Page:** A unified login page with role-based redirection for HOD, Coordinator, Investigator, Medical Officer, and Data Entry personnel. |
| * **Dashboard Views:**   **HOD:** Overview of all active, completed, and reassigned cases; filters for insurance company, type of case, and status.  **Coordinator:** Overview of cases assigned to them with options to assign, reassign, or reallocate tasks  **Field Investigator:** List of assigned cases with a progress tracker, deadlines, and TAT (Turnaround Time) monitoring.  **Medical Officer:** List of cases requiring review with access to all case documentation and data. |
| * **Case Registration & Assignment:** cases can be add by two ways   **Manual Upload:** HOD uploads a PDF containing case details and assigns a Coordinator.  **SATA API Integration**: Case data from the external SATA system is automatically received, creating a case entry.  **Coordinator Assignment:** HOD assigns a Coordinator upon case creation. |
| **Case Details Page :** Case Details Page: **Coordinator** enter details from the uploaded PDF and verify PAN, Aadhar, and doctor information via external APIs. |
|  | * **Case Details and verification:**   **Case Info:** Contains claim number (system-generated), insurance claim number, insurance company details, type of case, and rate (based on case type and insurance company).  **Verification:** Coordinator verifies information from the API and updates it in the case database. |
| **Functional Pages and Workflow** | * **Investigator Assignment & Visit management:**   **Visit Assignment:** Coordinator assigns investigators based on the case location.  **Questionnaire Creation:** Coordinator selects relevant questions from the question bank for each visit.  **TAT Management:** Each investigator has a time-bound task monitored through TAT, with SMS, email, and push notification alerts for deadlines.   * **Investigation Completion:** After completing a visit, the investigator uploads collected information, answers the questionnaire, and submits the visit status. |
| * **Case Review and Medical Assessment:**   **Coordinator Review:** All uploaded information is reviewed by the Coordinator.  **Medical Officer Review:** Medical Officer reviews the completed case, adds remarks on claim legitimacy, and suggests the claim amount.  **Data Entry & Report Generation:** Data Entry personnel compile a final report, incorporating pre-set fields from the database, and submit it for HOD’s review |
| * **Final review & Approval:**   **HOD Approval:** HOD reviews the final report and approves or sends it back for reassessment if needed.  **SATA API Return (if applicable):** If the case originated from SATA, the finalized report is sent back via the SATA API after HOD approval |
| * **MIS Reports:**   Reports are generated for each stakeholder based on key metrics:  **TAT Adherence:** Monitor turnaround time for each task completion.  **Case Status Reports:** For Investigators, Coordinators, and Medical Officers to track case status and actions taken.  **Outcome Tracking:** Claims approved, rejected, and reasons.  **Custom Filters:** Stakeholder performance, visit history, and case reassignment stats. |
| * **Case Creation & Assignment:**   **HOD Uploads Case PDF:** A case is created by either manually uploading a PDF (HOD) or receiving data from the SATA system (via API).  **Assign Coordinator:** HOD assigns a Coordinator to oversee the case investigation.   * **Coordinator Details Entry & Verification**   **Case Details Entry:** Coordinator reviews and enters details from the uploaded PDF (e.g., customer name, insurance company, etc.). Verification Process: Coordinator verifies essential details (PAN, Aadhar, and doctor information) via integrated APIs.  **Visit Requirement Analysis:** Coordinator assesses how many visits are needed, potentially to multiple locations (e.g., hospitals, chemists).  **Work Allocation:** If multiple visits are required, the Coordinator allocates work percentages among Investigators for fair compensation   * **Questionnaire Preparation & Investigator Assignment**   **Questionnaire Preparation & Investigator Assignment –**  Questionnaire Creation: Coordinator selects relevant questions from a pre-existing question bank, tailoring a specific questionnaire for each visit.  Assign Investigator: Based on the location(s) of the visits, the Coordinator assigns Investigators from the database, factoring in the investigator’s region, availability, and rates.   * **Investigator Notification & Task Execution:**   **Notifications Sent:** Assigned Investigators receive a notification (push through email, SMS) of the new case along with visit details, deadlines, and TAT Requirements.  **Visit Execution & Data Collection:** Investigator visits the location(s), gathers data, and completes the questionnaire on the app documents upload in PDF format. **Documentation Upload:** Investigator uploads all relevant information (e.g., images, PDFs, notes) to the app and marks the visit as “Investigation Completed.”  **Medical Officer Assignment:** Coordinator assigns the case to a Medical Officer from the database. |
| * **Medical Officer Assessment & Remarks:**   **Data Evaluation:** Medical Officer reviews all case data, including the investigator's findings, and evaluates claim legitimacy. **Summary & Recommendations:** Medical Officer writes a summary with remarks on whether the claim is valid and suggests an appropriate claim amount.   * **Data Entry for Final Report Compilation:**   **Case Forwarding:** After the Medical Officer’s assessment, the case is forwarded to the Data Entry Personnel. **Report Compilation:** Data Entry compiles a final report using a template that includes pre-defined sections from the database, filling in all required data and the Medical Officer’s remarks.   * **Final Review & Approval:**   **Coordinator Review:** The Coordinator reviews the compiled report for completeness and accuracy. **HOD Approval:** HOD conducts a final review and either approves or sends the report for reassessment, if needed |
| * **SATA System (if applicable):**   **SATA API Submission:** For cases originating from the SATA system, the finalized report is sent back to SATA via API after HOD approval. |
| * **MIS Reporting & Case Reopening:**   **MIS Report Generation:** MIS reports are generated for all stakeholders (HOD, Coordinator, Investigator, case outcomes, and reassignment data. - Reassessment or Reopening: If necessary, the Coordinator can reassign cases for further investigation or reopen completed cases |
|  |
| **Process Flow of the Investigation Case Management** |  |
|  |
|  |  |
|  |  |