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DEFINITION OF TERMS, ACRONYMS, AND ABBREVIATIONS

This section defines all terms, acronyms, and abbreviations required to interpret these terms correctly.

|  |  |
| --- | --- |
| **Term** | **Description** |
| AFAAR | Annual Fraud and Abuse Activity Report |
| CAP | Corrective Action Plan |
| CSV | Comma Separated Value |
| FWA | Fraud, Waste, and Abuse |
| GUI | Graphical User Interface |
| HDFS | The Hadoop Distributed File System |
| HIPAA | Health Insurance Portability and Accountability Act of 1996 |
| HTTPS | Hypertext Transfer Protocol Secure |
| KPI | Key Performance Indicator |
| SIU | Special Investigation Unit |
| SQL | Structured Query Language |
| UDF | User Defined Field |
| URL | Uniform Resource Locator |
| VPN | Virtual Private Network |
| AFAAR | Annual Fraud and Abuse Activity Report |

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1. **ABOUT THE DOCUMENT**
2. **Purpose**

This document is the User Manual for the Case Manager™ *(referred to as CM).*

The User Manual familiarizes users with the knowledge to fully use CM. It is designed to be read by any level user of CM and provides documentation for individuals who will use CM daily.

This manual includes a description of the application’s functions and capabilities and step-by-step guidance for system access and use.

1. **Scope**

This User Manual describes all the functionalities available in the latest release (3.7.0) for the Case Manager™ application.

1. **Audience**

This User Manual is intended to provide the necessary information to day-to-day users of the CM application.

1. **Reference Documents**

|  |  |
| --- | --- |
| **Document Name** | **Issuance Date** |
| FWA Finder™ User Manual | 10/15/2021 |

**Table 1: Reference Documents**

Page Break

1. **INTRODUCTION TO CASE MANAGER™**

Case Manager™ is a web-based software application used to manage the data, information, correspondence, claims, payments, and decisions about the cases created against any party involved in Fraud, Waste, and Abuse. The Case Manager™ Provides meaningful information about any case created at any time to any privileged stakeholder. It offers individual case management, a grouping of cases under a single Initiative, i.e., Initiative Case List management and Initiative Management in general. Case Manager also provides embedding Dashboards, i.e., having a large set of meaningful information under a single canvas, from FWA Finder™, a different product of Alivia Analytics Program Integrity Suite.

Having a separate reporting module through which various sets of reports (e.g., critical KPIs) are generated and managed for individual cases and groups of cases in a distinguished time window enables the Case Manager™ to produce helpful information for the users.

Case Manager™ also offers independence from the human intervention for every activity to be performed for a case, so it is equipped with an automated activity list processor, under which the user can add the list of actions to be performed on a case under various circumstances and the Case Manager™ will perform all the activities in a predetermined pattern.

1. **Modules of Case Manager™**

The application itself is built with a hierarchical tab and module design and allows users to move through stages of case management working in different areas for different cases.

|  |  |
| --- | --- |
| **Module** | **Functionality** |
| Dashboard | Allows the user quick information about the criteria based on the cases/initiatives created. It entails all the analysis information embedded from the FWA Finder™ Dashboard module. It is configurable at Case Manager™, i.e., if multiple dashboards are available, the user can select to see the required dashboard. |
| Case List | Allows the user to create a new case. It also allows the user to import the case(s) from an external file. Users can also view and edit the already-created cases under this module. |
| Initiative | Allows the user to create and work on many cases simultaneously. It enables users to interact with many providers, simultaneously reducing manual processes. Users can also view the list of already created Initiatives and cases under Initiatives from this module. |
| Activity List | Case Manager™ provides an advanced functionality to automatically configure and schedule a series of events triggered as an activity. Users can create schedule multiple events to be triggered on a schedule automatically. |
| Reports | Allow the user to execute and view the system configured reports. It also allows the user to download the reports in multiple formats. |
| Alerts | Allows the user to configure the Alerts and notifications in the Case Manager™ system. |

**Table 2:Modules of Case Manager™**

1. **GETTING STARTED**
2. **Cautions & Warnings**

The cautions and warnings which the user must consider before accessing the Case Manager™ application are included below.

* URL access to the application is only allowed through an ‘HTTPS’ extension, security certified.
* The application will work seamlessly using only the latest Google Chrome and Firefox browsers. in the application is HIPAA compliant.
* The user shall be HIPAA compliant or equivalent law for the particular country and use the application ethically.

1. **Set-up Considerations**

Users need to ensure that they have the latest version of Google Chrome installed to access the URL for the FWA application.

|  |  |
| --- | --- |
| **Browser** *(recommended)* | Google Chrome (Version 92.0.4515.131) or higher |

**Table 3 Browser Information**

1. **New User Onboarding**

[An authorized representative will submit a request to the Alivia Helpdesk for new user onboarding and specify the roles they need to be granted. The authorized representative will ensure that access is granted only upon ensuring that the user has taken the necessary HIPAA training and training on protecting PHI information.](bookmark://_New_User_Onboarding)

[Alivia staff will process the user creation request and provide them with temporary credentials at their specified contact information.](bookmark://_New_User_Onboarding)

[New users must complete the first-time login process within a specified time using the temporary credentials and must change their password upon the first login. Before accessing the system, all new users must complete the required Multi-Factor Authentication setup.](bookmark://_New_User_Onboarding)

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1. **ACCESSING THE CASE MANAGER™ APPLICATION**
2. **Application Access**

Users will access the Case Manager™ application through the website URL provided by Alivia Analytics™ for the respective organization. By accessing the provided URL, the user lands on the application's ‘Login Page’ as provided below.

 

**Figure 1: Login Page**

1. **Description of GUI – Login Page**

* **Username**: Input username *(usually email address)*.
* **Password:** Input password.
* **Login type:** A dropdown field allows users to select the login type.
* **Active Directory**
* **Local**
* **Login Button:** A clickable button to log the user into the application. The Login button becomes enabled when the user inputs a Username and Password.
* **Reset button:** A clickable button to clear the information entered in the Username and Password fields by the user.
* **SAML:** SAML is a third-party authentication service. Alivia uses PING identity and AZURE AD for third party discussion.

Page Break

2. **HDJCHEVJ**

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2. **Steps to Login**