

# **Newgen** **Dynamic Case Management**

For handling case-related content and communications  
in an intelligent and dynamic environment.

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## Overview

In the modern business landscape, organizations, like yours, are constantly faced with unanticipated scenarios and extenuating circumstances. These ad hoc, dynamic “cases” include customer escalations, process exemptions, frauds, incorrectly credited payments, and rejections of legible health claims. To effectively manage these extraneous situations, your knowledge workers must have the tools and systems to collaborate and adapt in real time.

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## Challenges Faced by Organizations

- Obsolete legacy systems
  - Manual notifications and reminders
  - Time-consuming review cycles
  - Lack of tracking capabilities to access confidential case data
  - Increased data leakage and low data security
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# Newgen Dynamic Case Management

The dynamic case management capability of Newgen's intelligent process automation (BPM) product suite empowers your knowledge workers with contextual information to collaborate and respond to real-time opportunities, as well as unanticipated situations, while adhering to compliance requirements. It can help you manage case-related information, documents, and communications by designing semi-structured and dynamic processes.

## The 3 Types of Case Management

The concept of case management can be applied to multifarious business needs and can be broken down into three broad categories. The three types of case management are:

Investigative Case Management	Service Request Management	Incident Management
<p>Streamlines fraud investigations across various organizational processes through advanced analytics and audit capabilities.</p> <p><b>Examples</b> - insurance claims, medical claims</p> <ul style="list-style-type: none"><li>■ Prepare case reports automatically with fraud intelligence and threat detection analytics</li><li>■ Track cases from origination, maximize visibility, and allow for comprehensive reporting on critical information</li><li>■ Expedite each investigation with centralized case information and identify frequent defaulters</li></ul>	<p>Handles diverse customer requests that require specific actions.</p> <p><b>Examples</b> - customer onboarding, grants management</p> <ul style="list-style-type: none"><li>■ Enable role-based access and streamline the flow of information in order to speed up response times</li><li>■ Leverage original articles and content, created by subject-matter experts and approved for use, to constantly update your knowledge repository</li><li>■ Access data anytime, from any device and improve performance</li></ul>	<p>Addresses incidents that can create operational, customer-related, or statutory issues for your organization, and which need to be rectified to avoid future reoccurrence.</p> <p><b>Examples</b> - dispute resolution, HR grievances</p> <ul style="list-style-type: none"><li>■ Resolve cases faster with transparent processes and accessible information</li><li>■ Provide context to case collaboration to drive more effective action</li><li>■ Share important case files quickly and securely with automated document sharing</li></ul>

# Key Components of Newgen Dynamic Case Management

## ■ Document Scanning and Capture

Compile all case-related content, that exists in various formats, under a single location. Extract, index, and classify relevant data from the captured content and provide accurate, useful insights

## ■ Structured and Unstructured Workflow

Design and deploy synchronized, ad hoc processes and alter case routing structures to handle unprecedented situations. Provide flexibility to execute discretionary tasks based on changing goals

## ■ Document and Content Management

Create, manage, and share relevant content, information, data, and reports to all case stakeholders. Leverage Newgen's integrated output management system to handle your outbound content, such as correspondence and reports

## ■ Analytics and Activity Monitoring

Measure the performance of case elements with smart analytics and a business activity monitoring tool. Allow your case managers to govern case-specific KPIs and leverage dashboards providing information on the status of each case

## ■ Storage, Archival, and Retrieval

Leverage Newgen's smart records manager and auto-classification tool to store, archive, and retrieve case-related information



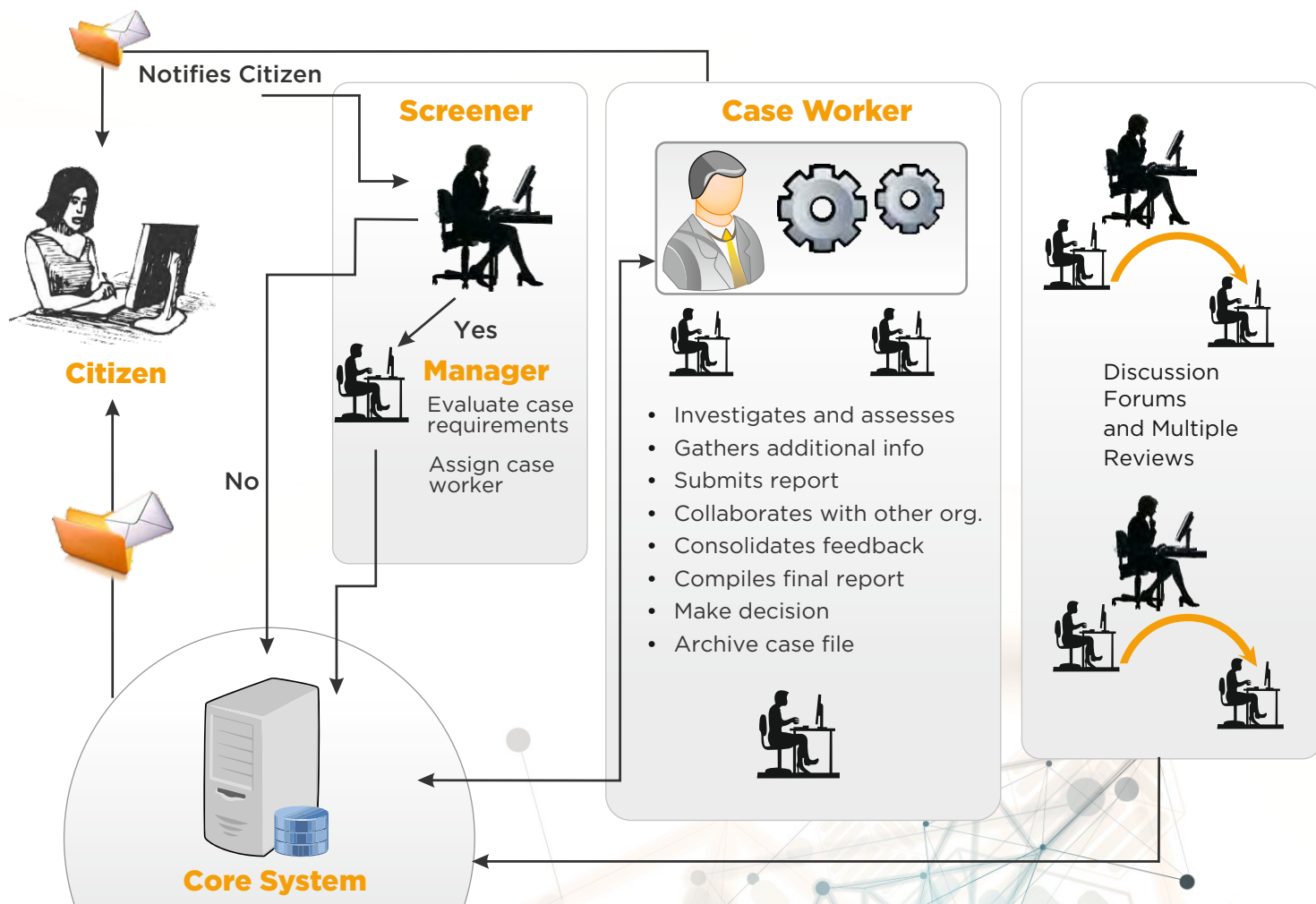
# End-to-end Resolution of a Case with Newgen Dynamic Case Management

## Case Initiation

## Case Assessment and Assignment

## Case Management and Transition

## Collaboration





# Practical Applications of Dynamic Case Management

## Financial Services

Financial institutions are always grappling with fraud and stringent regulatory guidelines, which affect their performance and operational efficiency. An effective case management software provides the subjectivity required to manage and resolve risk, compliance, and fraud issues.

- **Anti-money Laundering Investigations** – Renders advanced tools for the detection, investigation, and reporting of suspected money laundering and illegal financing activities
- **Customer Due Diligence** – Allows organizations to improve customer relationships through a comprehensive risk evaluation process spanning multiple applications and systems
- **Operational Risk Management** – Provides in-depth, enterprise-wide insights to manage all risk, controls, and compliance obligations
- **Trade Compliance** – Closely monitors trading activities with dynamic scenarios and detection techniques to identify potentially manipulative or illicit trading practices
- **Fraud Detection** - Enables a comprehensive view of financial activity through enterprise-wide surveillance of accounts, customers, and third parties in transactions across all business lines
- **Service Request Management** – Facilitates smooth operations for critical processes, including claims processing, claims assessment, loan origination, etc.



## Government

Government organizations are tasked with improving their service delivery with limited resources. A dynamic case management software enables governments to increase efficiency at all levels and provide improved accountability and transparency in their operations.

- **Social Welfare** – Manages end-to-end social welfare services, such as childcare, healthcare, and food and shelter programs, by tracking them across their complete lifecycle
- **Grants** – Automates the provisioning of grants to provide more clarity and accountability into the process
- **Licenses and Permissions** – Improves technical reviews and decision-making to expedite permits and licenses through enhanced process visibility and access to information
- **Grievance Redressals** - Helps in capturing citizen complaints and directing them to the appropriate government officials for timely redressal. It also removes bottlenecks through end-to-end process mapping
- **Workers Compensation** - Provides a common platform for state agencies, employers, insurers, third-party administrators, medical providers, and workers' compensation courts to enable quick relief to workers who have sustained injuries or occupational diseases over the course of their employment
- **Correspondence and Communications Management** – Manages all inbound correspondence from citizens and streamlines communications for millions of internal and external stakeholders with accurate and precise information



## Healthcare

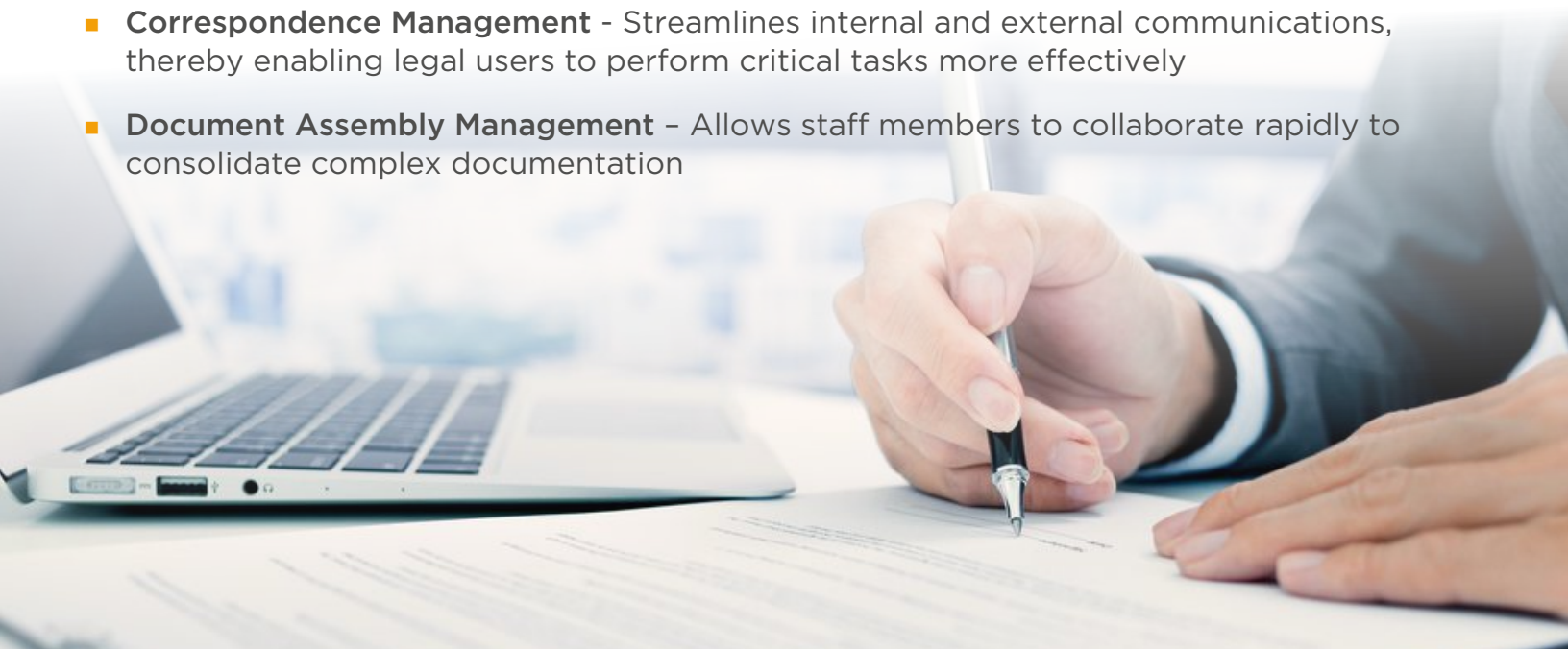
Healthcare providers are dealing with rapidly changing market dynamics and a series of regulatory reforms, all while striving to maintain a high quality of services. Newgen Dynamic Case Management software can transform operations for both payers and providers into truly people-centric programs that meet business, quality, and regulatory demands.

- **Care Management** – Enables real-time decision-making through advanced predictive and adaptive analytics to develop personalized care plans and deliver a patient-centric experience
- **Appeals and Grievances Management** – Ensures the speedy resolution of complaints, appeals and grievances through skill-based, role-based, and case-based case routing, with provisions to manage escalations and case exceptions
- **Member Enrollment** – Bridges the gap between people, processes, and content to grow member enrollment through smarter prospecting and faster processing
- **Provider Contracting Management** – Fortifies the contracting process by comprehensively tracking performance against pre-defined SLAs and contractual obligations

## Legal

The legal industry is highly document sensitive, wherein contextual information plays a critical role in the outcome of each case. Newgen Dynamic Case Management software allows legal firms to focus on all the key aspects of a case by rendering contextual knowledge from multiple sources in real time.

- **Document Management** - Stores legal documents, letters, and scanned copies separately in a searchable location while maintaining the required formats and topics
- **Correspondence Management** - Streamlines internal and external communications, thereby enabling legal users to perform critical tasks more effectively
- **Document Assembly Management** – Allows staff members to collaborate rapidly to consolidate complex documentation





# Why Should You Choose Newgen for Dynamic Case Management?



## About Newgen

Newgen Software is a vendor/provider of Business Process Management (BPM), Enterprise Content Management (ECM), Customer Communication Management (CCM), Document Management System (DMS), Workflow and Process Automation software. The company has a global footprint in over 69 countries with large, mission-critical solutions that have been deployed in Banks, Insurance firms, BPO's, Healthcare Organizations, Government and Telecom Companies.

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