

**APPRISS<sup>®</sup>**

HEALTH

## AWARxE Case Management Module

User Support Manual

**Connecticut Prescription Monitoring and Reporting System**

November 2018

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# 1 Document Overview

This *Case Management Module User Support Manual* provides instructions for using the AWARxE Case Management module in the Connecticut Prescription Monitoring and Reporting System (CPMRS). It is intended for law enforcement personnel whose user role permissions allow them to create and manage cases within the AWARxE application.

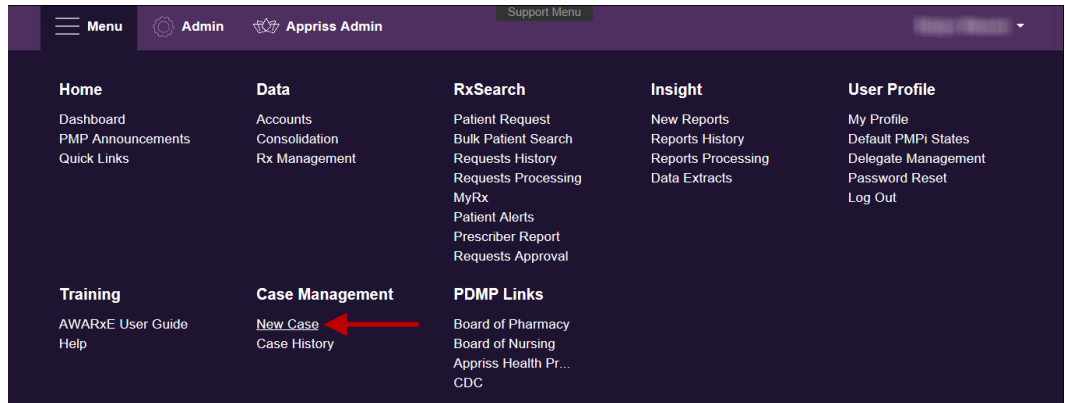
**Note:** For complete instructions on using AWARxE, including how to log into the system, please refer to the *AWARxE User Support Manual*.

## 2 Case Reports

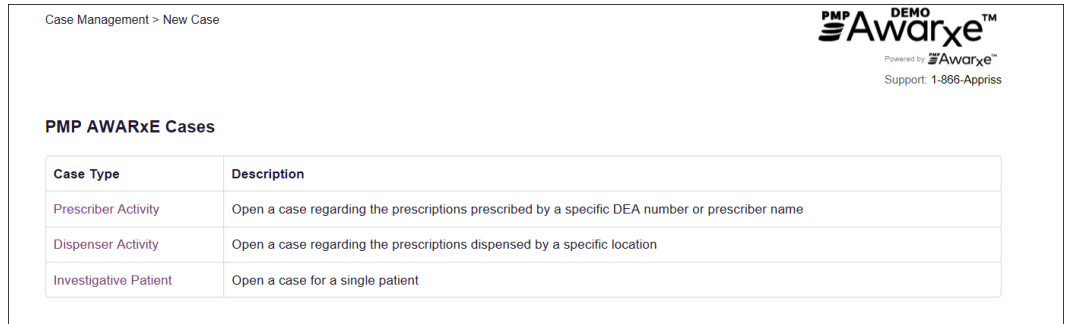
This chapter provides instructions for creating a new case and viewing existing cases.

### 2.1 Create a New Case

1. Log in to AWARxE.
2. To begin creating a new case, click **Menu > New Case**.



The PMP AWARxE Cases page is displayed.



3. From the PMP AWARxE Cases page, click the desired case type (i.e., **Prescriber Activity, Dispenser Activity, or Investigative Patient**).

The following case types can be created in AWARxE:

Case Type	Description
Prescriber Activity	A case regarding the prescriptions attributed to a specific DEA number or prescriber name
Dispenser Activity	A case regarding the prescriptions dispensed by a specific dispenser
Investigative Patient	A case regarding a single patient

Once you select the desired case type, the Create New Case Report page is displayed.

### Prescriber Activity Case Report \* Indicates Required Field

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Investigation Type

Case Number\*

Prescriber First Name\*      Prescriber Last Name\*  
     

Prescriber DEA

Address

City      State      Zipcode  
           

---

**Case Settings**

**Case Status**

Active

Inactive

**Confidentiality**

Public: Case is visible in Case History Queue

Private: Don't show case to anyone other than case creator

---

Create Case Report

4. Enter the case information, noting that required fields are marked with a red asterisk (\*).

The available **Investigation Types** are listed below:

- Case Update
- Collaboration with Local Pd
- Forgery
- Healthcare Professional Subterfuge
- Inappropriate Dispensing Prescribing by Registrant
- Mass Health Recipient Payment Cash
- Person Selling Rx Drugs
- Questionable Activity
- Review Prescribing Dispensing as Part of Ongoing Investigation
- Review Individual as Part of Ongoing Investigation
- Stolen Rx Blanks
- Tampering

5. Choose the case settings using the information provided in the following table:

Case Setting	Description
Case Status	Choose whether the case is <b>Active</b> or <b>Inactive</b> ; the default setting is <b>Active</b>

Case Setting	Description
Confidentiality	Choose who can view your case: <ul style="list-style-type: none"> <li>• <b>Public</b> – case is visible to all other users who have access to the Case Management module</li> <li>• <b>Private</b> – Case is only visible to you</li> </ul>

6. Click **Create Case Report**.

The case is created and the Case Report page is displayed.

The screenshot shows a 'Success' message at the top: 'Case Report successfully created.' Below this is the 'Prescriber Activity Case Report' page. It includes an 'Export to PDF' link, a 'Run New Report' button, and a 'Review Search History' button. The report details are as follows:

- Investigation Type: Questionable Activity
- Case Number: 12345678
- Prescriber First Name: Test
- Prescriber Last Name: Prescriber
- Prescriber DEA:
- Address:

The 'Case Settings' section includes:

- Case Status:**
  - Active
  - Inactive
- Confidentiality:**
  - Public: Case is visible in Case History Queue
  - Private: Don't show case to anyone other than case creator

A 'Save Changes' button is located at the bottom right of the settings section.

7. From this page, you can perform the following tasks. Click the link for complete instructions on how to perform a specific task.

- Click **Export to PDF** to download a PDF copy of the Case Report.
- [Click Run New Report to run a new Insight Report.](#)
- [Click Review Search History to view previous searches associated with the case number you entered.](#)

**Note:** The Reports History page is automatically filtered by report type (e.g., if you created a Prescriber Activity Case Report, the Reports History page is filtered to display only prescriber activity requests) and the case number you entered when creating the case.

- Update the Case Status and/or Confidentiality by choosing the appropriate setting and clicking **Save Changes**.
- [Click Add Case Comment to add a comment to the case.](#)
- [Click Add Alias Name to add any known suspect aliases.](#)

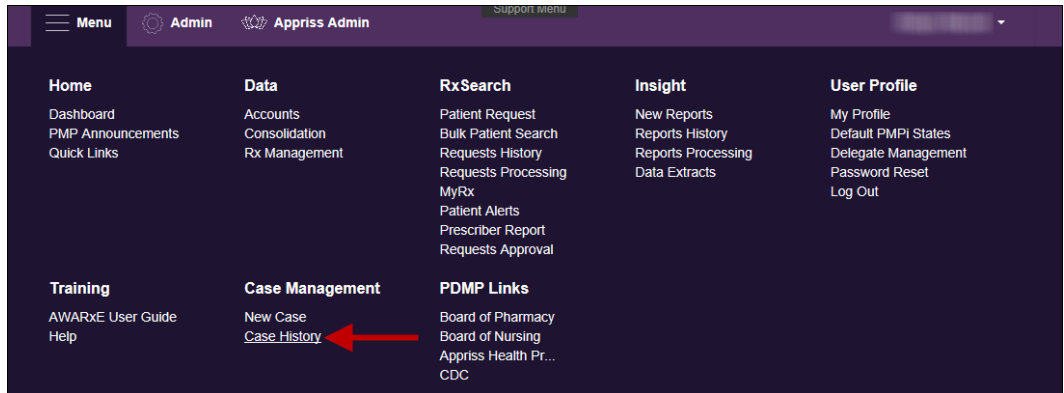
**Note:** This option is only available for Investigative Patient Case Reports.

- [Click Upload Document to attach a document to the case.](#)
- [Click Add Myself to add yourself as an officer investigating the case.](#)

## 2.2 Case History

To view existing Case Reports, including reports created by you as well as reports created by other users and set to “Public”:

1. Log in to AWARxE.
2. Click **Menu > Case History**.



The Case History page is displayed.

**Case History**  
Select a case number below to view information about case and related searches. View Filters ▼

Case Number	Date Created	Case Type	Entity	Status
<a href="#">123456</a>	07/16/2018 3:40 PM	Investigative Patient	Test Patient	Active
<a href="#">12345</a>	07/16/2018 3:40 PM	Dispenser Activity	Test Pharmacy	Active
<a href="#">12345678</a>	07/16/2018 3:06 PM	Prescriber Activity	Test Prescriber	Active
<a href="#">1014</a>	07/02/2018 7:11 PM	Prescriber Activity	Doctor Good	Active
<a href="#">12456789t</a>	06/28/2018 5:56 PM	Prescriber Activity	appriss test	Active

**Note:** You can click **View Filters** to filter the Case History page by case number, case type, case status, dispenser name, prescriber name, and/or suspect name.

**Case History**  
Select a case number below to view information about case and related searches. Hide Filters ▲

**Filter Queue**

Case Number:  Case Type:  Case Status:

Dispenser Name:  Prescriber Name:  Suspect/Subject/Patient Name:

Case Number  Date Created  Case Type  Entity  Status

3. Click the link in the **Case Number** column to view the desired case.

The Case Report page is displayed.

**Investigative Patient Case Report** [Export to PDF](#)

Investigation Type:  
 Case Number: 123456  
 Suspect First Name: Test  
 Suspect Last Name: Patient  
 Address:

[Run New Report](#)  
[Review Search History](#)

**Case Settings**

**Case Status**      **Confidentiality**

Active       Public: Case is visible in Case History Queue  
 Inactive       Private: Don't show case to anyone other than case creator

[Save Changes](#)

**Case Comments**

4. From this page, you can perform the following tasks. Click the link for complete instructions on how to perform a specific task.

- Click **Export to PDF** to download a PDF copy of the Case Report.
- [Click Run New Report to run a new Insight Report.](#)
- [Click Review Search History to view previous searches associated with the case number for the report selected.](#)

**Note:** The Reports History page is automatically filtered by report type (e.g., if you created a Prescriber Activity Case Report, the Reports History page is filtered to display only prescriber activity requests) and the case number you entered when creating the case.

- Update the Case Status and/or Confidentiality by choosing the appropriate setting and clicking **Save Changes**.
- [Click Add Case Comment to add a comment to the case.](#)
- [Click Add Alias Name to add any known suspect aliases.](#)

**Note:** This option is only available for Investigative Patient Case Reports.

- [Click Upload Document to attach a document to the case.](#)
- [Click Add Myself to add yourself as an officer investigating the case.](#)



## 3 Case Report Management

This chapter describes how to update and manage Case Reports, including:

- [Running a new Insight Report](#)
- [Reviewing your search history](#)
- [Adding a comment to a case](#)
- [Adding a suspect's alias\(es\)](#)
- [Attaching a document to a case](#)
- [Adding yourself as an officer investigating a case](#)

[Create a new case](#) or [open an existing case](#) to access these features.

### 3.1 Run a New Report

This feature allows you to navigate to the Insight Reports page and generate a new Insight Report using the information you provided on the Case Report.

1. From the Case Report page, click **Run New Report**.

**Investigative Patient Case Report** Export to PDF

Investigation Type:  
Case Number: 123456  
Suspect First Name: Test  
Suspect Last Name: Patient  
Address:

**Run New Report**  
**Review Search History**

**Case Settings**

**Case Status** **Confidentiality** Save Changes

Active  Public: Case is visible in Case History Queue  
 Inactive  Private: Don't show case to anyone other than case creator

**Case Comments**

The Insight Report page is displayed.

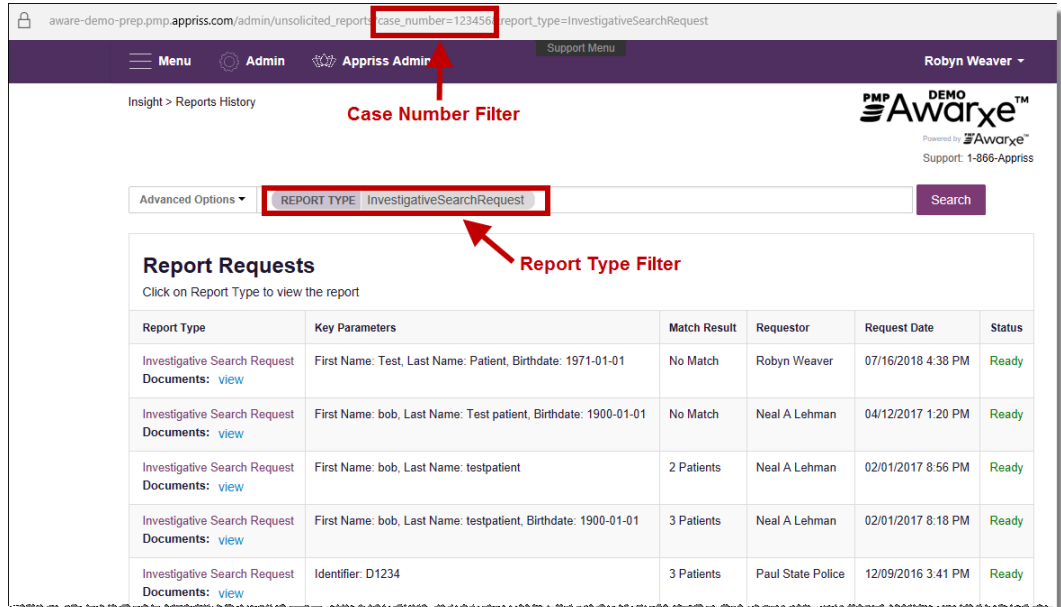
2. Complete the information on the Insight Report page, noting that (1) the case number, prescriber/dispenser/suspect name, and suspect DOB (if applicable) you provided on the Case Report are automatically populated, and (2) required fields are marked with a red asterisk (\*).
3. Click **Search**.  
A message is displayed indicating that the report has been created.
4. Click **Menu > Insight > Reports History** to view your report.

## 3.2 Review Your Search History

This feature allows you to view your search history based on report type and case number.

1. From the Case Report page, click **Review Search History**.

The Report History page is displayed. Note that this page is automatically filtered by report type (e.g., if you created an Investigative Patient Case Report, the Reports History page is filtered to display only investigative patient search requests) and the case number you entered when creating the case. All reports generated under this case number, including those generated by you as well as any other users, are displayed.

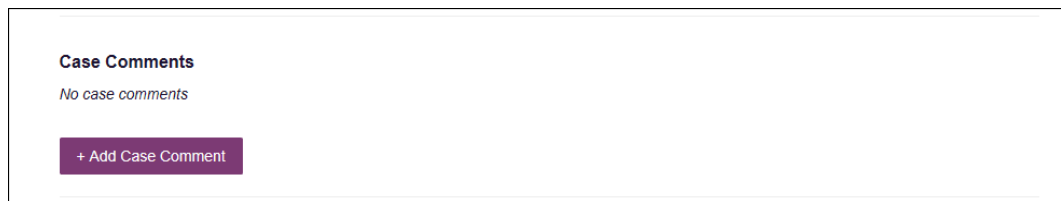


2. Click the link in the **Report Type** column to view the desired report.

### 3.3 Add a Comment to a Case

This feature allows you to add comments to a case.

1. From the Case Report page, click **Add Case Comment**, located in the Case Comments section of the page.



The Add a Case Comment window is displayed.

2. Type your comment in the **Add Note** field, then click **Save**.

**Note:** Case comments are limited to 2500 characters.

Your comment is saved and added to the report.

**Notes:**

- If necessary, you can click **Edit** to display the Add a Case Comment window and update your comment; however, case comments cannot be deleted.
- Notes are displayed in descending order with the most recent note at the top.
- Each comment is timestamped with the user who added the comment and the date and time it was added.

### 3.4 Add an Alias Name

This feature allows you to add to the Case Report any known aliases for the suspect.

**Note:** This option is only available for Investigative Patient Case Reports.

1. From the Case Report page, click **Add Alias Name**, located in the Suspect Alias Name(s) section of the page.

The screenshot shows a section titled "Suspect Alias Name(s)" with the text "No suspect alias name(s)" below it. At the bottom of this section is a purple button labeled "+ Add Alias Name".

The Add Alias Name to Case window is displayed.

The screenshot shows a dialog box titled "Add Alias Name to Case # 123456" with a close button (X) in the top right corner. It contains three input fields: "First Name", "Last Name", and "Date of Birth" (with a placeholder "MM/DD/YYYY"). At the bottom right are "Cancel" and "Save" buttons.

2. Enter the alias first name, last name, and/or date of birth (MM/DD/YYYY).
3. Click **Save**.

The alias is added to the case report.

The screenshot shows the "Suspect Alias Name(s)" section now containing one entry. The entry has fields for "First Name: Alias", "Last Name: Patient", and "Date of Birth: 1971-01-01", followed by a "Remove" button. Below the entry is the "+ Add Alias Name" button.

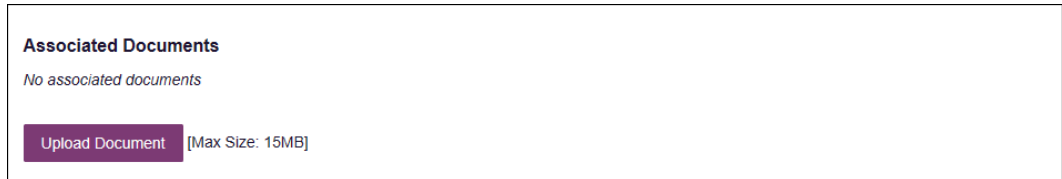
**Note:** You may click **Remove** at any time to remove the alias from the Case Report.

4. If necessary, repeat steps 1-3 to add additional aliases.

## 3.5 Attach a Document to a Case

This feature allows you to attach documents associated with the case to the Case Report.

1. From the Case Report page, click **Upload Document**, located in the Associated Documents section of the page.



Your computer's file explorer is opened.

2. Select the desired document, noting that the maximum file size is 15 MB, and then click **Open**.

### Notes:

- The maximum file size is 15 MB.
- The document file type must be PDF, JPEG, or PNG.

The document is attached to the Case Report.



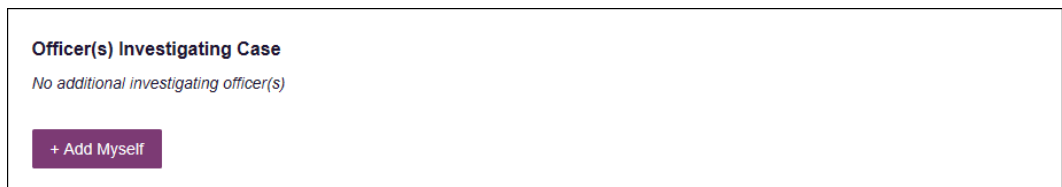
### Notes:

- Documents are displayed in descending order with the most recent document at the top.
- Each document is timestamped with the user who uploaded the document and the date and time it was uploaded.

## 3.6 Add Yourself to a Case

This feature allows you to associate yourself with a case. *Note that all officers associated with a case are displayed in this section of the page.*

1. From the Case Report page, click **Add Myself**, located in the Officer(s) Investigating Case section of the page.



The Add Myself as an Officer Investigating Case window is displayed.

**Add Myself as an Officer Investigating Case** ✕

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**Name:** Robyn Weaver  
**Agency:**  
**Email:** Robyn Weaver@int  
**Phone:**

If you have a different case number associated with this case.  
 Please enter it below

Case Number



---

2. If you have a different case number associated with this case, enter it in the **Case Number** field; otherwise, continue to step 3.
3. Click **Save**.

You are added to the Case Report as an officer investigating the case.

**Officer(s) Investigating Case**

Name: Robyn Weaver Remove  
 Agency:  
 Email: Robyn Weaver@int  
 Phone:  
 Case #:

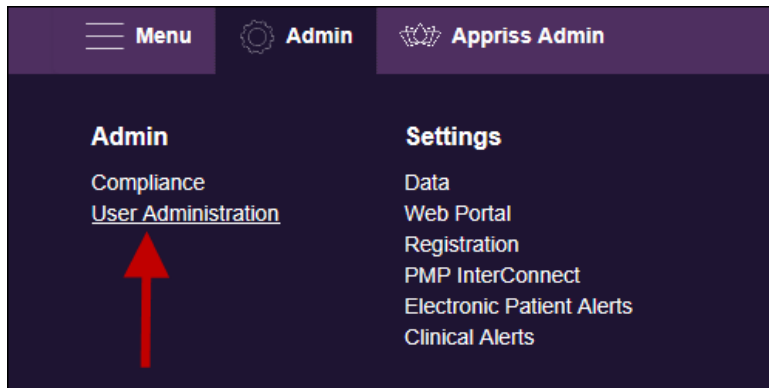
**Note:** You may click **Remove** at any time to remove yourself or another officer from the Case Report.

# 4 Case Management Configuration

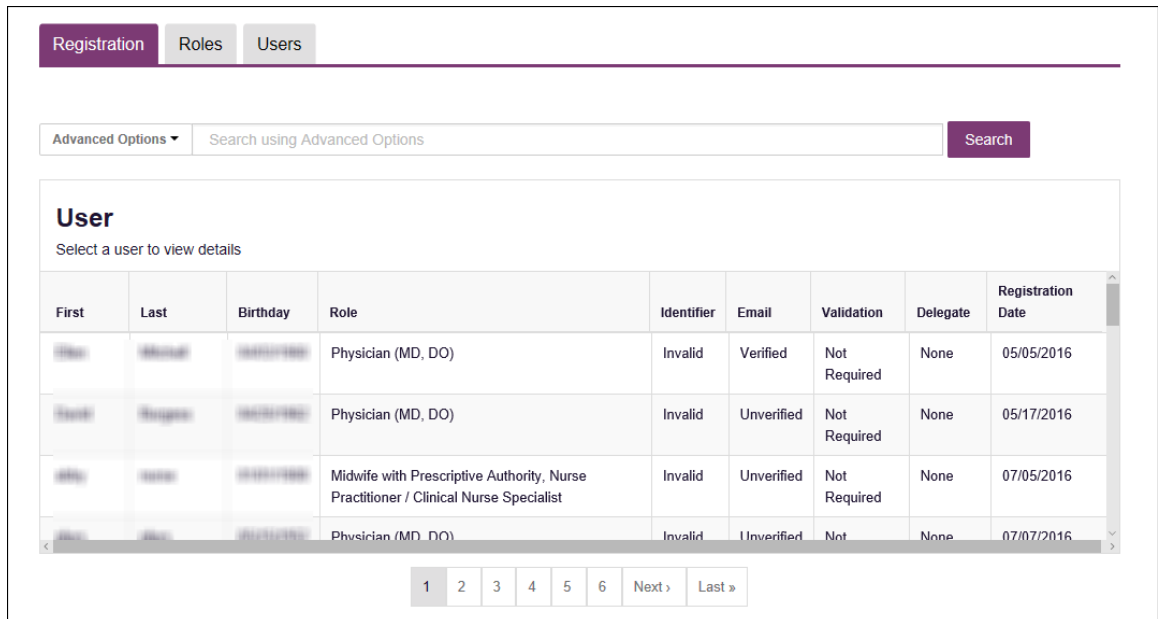
Access to the Case Management module is granted via user role permissions. This chapter describes the steps admin users should follow to add Case Management permissions to a user role.

**Note:** Users who have access to Case Management should also have access to Insight Reports > New Reports and Reports History. If the user role permissions include Case Management but not Insight Reports and Reports History, users will be able to create a case, but they will not be able to run PMP reports to view the data associated with those cases.

1. Log in to AWARxE as an admin user.
2. Click **Admin > User Administration**.



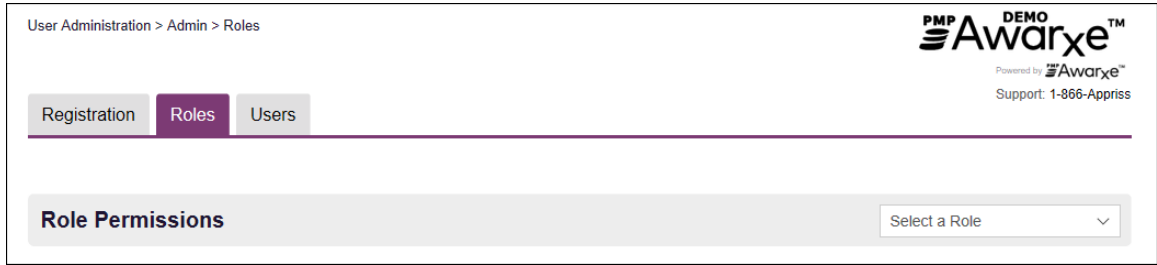
The User Administration page is displayed.



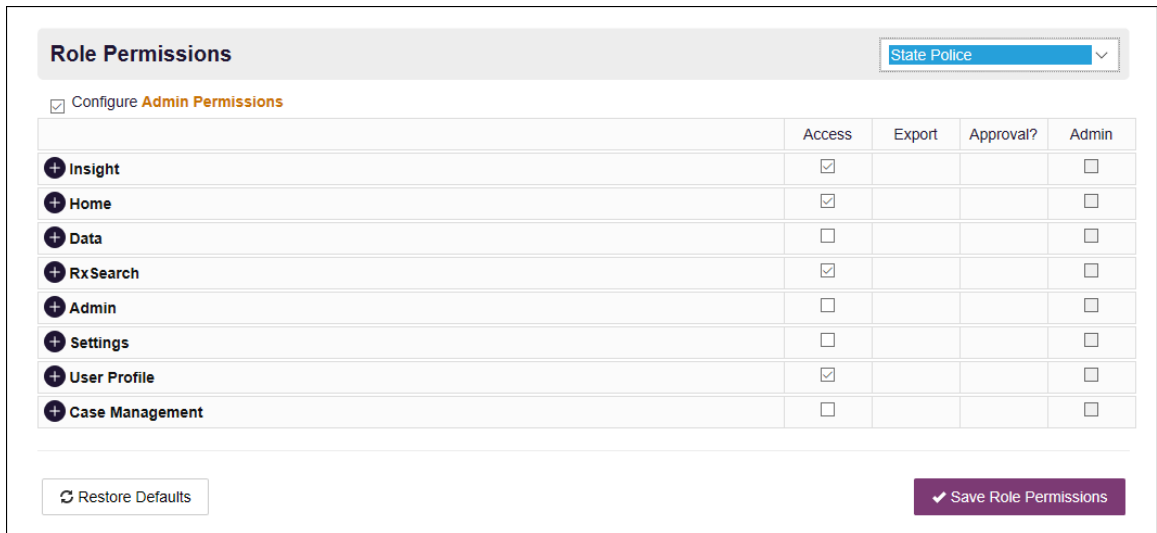


3. Click the **Roles** tab.

The Role Permissions page is displayed.



4. Select the appropriate law enforcement role from the drop-down list in the **Select a Role** field.



5. Click **Case Management** to expand that section and select the necessary permissions.



6. Once you have finished adding the Case Management permissions, click **Save Role Permissions**.

A message is displayed indicating that the user role permissions have been updated, and all users with that user role will now have access to the Case Management module.

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# 5 Document Information

## 5.1 Disclaimer

Appriss has made every effort to ensure the accuracy of the information in this document at the time of printing; however, information is subject to change.

## 5.2 Change Log

Version	Date	Chapter/Section	Change Made
DRAFT	07/16/2018	N/A	N/A; initial publication
DRAFT v2	08/27/2018	Global	Updated with feedback from State
DRAFT v3	11/05/2018	Global	Updated with further feedback from the State