

CaseShield® AI Summary Add-On

Instant Case Log Summaries Powered by Generative AI

OVERVIEW

CaseShield® AI Summary is an optional add-on feature that uses Generative AI to automatically summarize Case Log Activity within CaseShield.

Payment integrity, compliance, and SIU teams spend valuable time reviewing detailed case notes, updates, referrals, and activity history. This feature transforms lengthy case logs into clear, structured summaries that highlight key developments, investigative milestones, red flags, and case progression.

When clients subscribe, the AI Summary functionality becomes seamlessly available within their CaseShield workflow.

HOW IT WORKS

Once enabled, CaseShield AI Summary:

- Analyzes structured and unstructured Case Log Activity
- Synthesizes investigative notes, updates, and actions
- Generates a clear narrative summary in seconds
- Maintains alignment with case facts and documented activity
- Produces professional, share-ready summaries for reporting and leadership review

The output is formatted for clarity and consistency, helping teams quickly understand case trajectory without combing through every entry.

KEY BENEFITS

Accelerates Case Review

Reduces time spent reading activity logs.

Improves Executive Visibility

Creates concise summaries suitable for leadership updates and reporting.

Enhances Investigative Continuity

Helps new auditors and investigators quickly get up to speed on active or reassigned cases.

Supports Documentation Consistency

Standardizes how case narratives are summarized across the organization.

Seamless CaseShield Integration

Available directly within CaseShield upon subscription.

CLIENT VALUE EXAMPLE

Challenge: Supervisors and compliance leaders need quick visibility into case status but don't have time to review full case logs.

Solution: CaseShield AI Summary delivers an instant narrative overview highlighting investigation scope, red flags, financial exposure, and activity milestones.

The screenshot displays the CaseShield user interface for 'HCFS Demo Company'. The user is logged in as 'Hello Karen Weintraub' with a last login of '2/23/2026 5:24:42 PM'. The navigation menu includes: CLAIMS, PROVIDERS, PHARMACY, MEMBERS, ALERTS, FWA360LEADS, QUERYSHIELD, CASES, REPORTS, ADMIN, and HELP. The 'Case View' section shows a 'Take Action' menu with options: Case Synopsis, Clone Case, Print Form, Print Case, Generate AI Summary (highlighted), Review AI Summary, Assign, and Create. The case details for Case ID 20250220-63776 are: Case Name: SMITH, DOUGLAS; Stage Updated: 2/20/2025 2:30:05 PM; Phase: Pre-Case/Lead; Last Updated By: Hardesty, Megan; Last Updated: 2/9/2026 1:27:33 PM; Total Time Spent: 0 min. Below this is a 'PostShield Matches' table with columns for Overview, Leads, Case Log, Participants, and Audit. The main content area shows a generated AI summary for Case Number 20250220-63776, identifying the main subject as DOUGLAS SMITH and the referral date as 2/20/2025. The summary text reads: 'Case Number 20250220-63776, which was initiated on February 20, 2025, involves the investigation of DOUGLAS SMITH, a healthcare provider. The investigation has identified several potential red flags for fraud, including a high concentration of revenue from a single procedure, 97532, and a single revenue code, 0128, which pertains to semi-private two-bed rehabilitation services. Furthermore, the facility has a notably high percentage of patients from out-of-area locations, which may indicate the provision of inappropriate services. The investigation has also noted discrepancies in the top paid procedure and revenue code, suggesting potential misuse of codes. Notably, the top paid procedure was also the most frequently performed procedure, and the top paid revenue code was not the most frequently used revenue code. Additionally, the facility submitted claims for 29 patients, with 97% of them being from out-of-area locations, and patients returned for visits more frequently than their peers. The investigation has also uncovered prior cases involving DOUGLAS SMITH and the facility, with DOUGLAS SMITH having a prior case with \$518 paid and the facility having a prior case with \$814,741 paid. The current year's top alerts include "[2301-01] - INAPPROPRIATE SERVICE: Member addresses that are large geographic distances from the Provider," and the top 5 alerts include [2301-01], [1006-01], [2259-01], [1002-01], and [1024-01].'



Activate Gen AI Summary Today

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