

# Manage Cases as an Analyst

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## Overview

In Genpact Deduction Management, as an Analyst you process a case for deductions. Processing the case includes verification of the case documents, adding missing or failed documents, validating the extracted data manually, adding missing data, validating the case, prepare billback if required, and closing the case, if billback is not required.

## Processing a case

Once a case is created in the system, it is assigned to a team and an Analyst based on the predefined rules. The newly created case is then visible in the portal grid.

1. As an Analyst, log in to the portal using your credentials.
2. Navigate to the cases list grid.
3. From the list, fetch the case you want to process.
4. On the Case details page, process the case details in the Details tab, documents in the Attachments tab and the extracted data in the Eyeball tab.
5. Click **Submit** to submit the case.

## Case Status

The following are various statuses a case moves to while it is processed for deductions.

- **New:** A new case is created.
- **Exception:** If from the documents attached to the case there are any failed or missing documents. The documents are visible in the case Attachments tab. The Analyst can fix the exception by uploading the missing or failed file from the Documents Status section in the Attachments tab.
- **Eyeball:** The user manually confirms the extracted data (POD document) in the case Eyeball tab.
- **Validation:** The system validates the data using a four-way matching process. On completion the case status changes to Validated.
- **Validated:** The validation is complete. The Analyst can review the validation results and submit the case. Upon case submission, if there is one or more invalid or partial valid line items, a new task is opened for billback process, and the case status changes to Billback preparation.
- **Billback Preparation (for invalid/partial valid cases):** The system sends the invalid and partial valid case for billback.
- **Billback (for invalid/partial valid cases):** The system sends a billback request email for the case, with the total billback amount and the list of SKU that were identified as invalid or partial valid.
- **Closed (for valid cases):** The system closes a valid case.