Case Management Software Buyer's Guide for Education HR

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WHY
According to the Washington Business Journal, HR managers spend between 25 and 60 per cent of their time working to resolve workplace conflicts.

ROI
Case management software offers exceptional return on investment.

1. What is Case Management Software and How Will it Help Our Investigations?

Case management software makes it easy for education professionals, investigators and their teams to create cases and manage multiple investigations at once. Managers can collect and analyze investigative data to manage risk and identify opportunities for improvement.

With all case information secured in a centralized database, case management software provides complete documentation of an investigation, with every action recorded in the case file. Digital evidence can be uploaded to the case file, including interview recordings, images, notes, emails and supporting documents. Case management software can be integrated with your databases, pulling information from these files to populate fields.

Web-based case management software enables investigators and other team members to access case files from any place with an Internet connection. If your case management software platform provides a means for setting up access roles, you can set restrictions to ensure that each user can access only the case information they need. This keeps confidential information secure and private, in full compliance with state and federal information privacy regulations.

BACKGROUND

Incidents such as harassment, discrimination, safety concerns and employee misconduct affect more than just those directly involved. They can disrupt the overall environment, affecting students, other employees and the organization as a whole.

Education HR teams need tools specifically built to support comprehensive incident investigations. The data provided by these platforms offers workplace-wide visibility into all occurrences, guiding leaders to take steps to prevent future issues.

How Case Management Software Works:

Employees, Parents, Students

HR Professionals, Investigators

Board, President, Chancellor

Intake

Create new cases quickly and easily, collecting all complaints and case related information from any intake stream into one central file.

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**HOTLINE
CALL CENTER
INTERNAL WEB FORM
EMAIL-TO-CASE**

Case Management

Manage investigations with workflow rules that create a logical, structured process with all case information stored in one place.

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**NOTES
TO-DO'S
EMAILS
ATTACHMENTS
INTERVIEW REPORTS
INVESTIGATION REPORTS**

Reporting

Analyze investigation data using summary reports that provide in-depth information on trends and areas of risk.

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**WRITER
DASHBOARD
DISTRIBUTION**

ALERTS / WORKFLOW

ACCESS / ROLES

Why Do I Need Case Management Software?

An effective investigation and case management solution eliminates blind spots and information silos across organizations. A centralized case management platform keeps all case information together in an organized, accessible format. This helps key stakeholders spot patterns and recurring issues in employee misconduct, safety, security and discrimination throughout an organization.

Case management software also helps to protect education institutions against liability in cases of recurring employee misconduct or safety and security issues, even when they occur in different locations or campuses. An institution-wide solution adds clarity and awareness, allowing visibility into recurring issues and escalation wherever they occur.

If your organization is using spreadsheets, an outdated in-house system or separate solutions, your risk factor is higher than it needs to be. Valuable information may be falling through the cracks, and you may be missing opportunities to improve the wellbeing of your workplace and employees.

Employee misconduct or safety and security issues that aren't properly tracked, investigated and remedied can result in harm to employees and students, and lead to expensive legal and settlement costs.

INVESTIGATE EVERY COMPLAINT AND INCIDENT, INCLUDING:

• Health and safety incidents
• Discrimination
• Harassment
• Employee misconduct
• Retaliation
• Parent/student complaints
• Plus much more

Case Management Software Helps Education Institutions Quickly Address

- Safety and security concerns
- Absenteeism and punctuality issues
- Harassment, sexual harassment and bullying allegations
- Policy violations
- Fraud and theft
- Employee misconduct
- Compliance lapses

By Implementing Case Management Software, You Will:

- Capture every complaint and incident
- Monitor case progress in real time
- Use alerts and notifications to enforce a consistent investigative process
- Provide early notice for cases that are off-track or high-risk
- Close cases faster
- Create investigation reports in seconds
- Conduct root cause analysis
- Eliminate blind spots, reduce risk and forecast trends
- Comply with federal and state regulations
- Provide a safe and secure working and learning atmosphere
- Save time and money

Why Case Management Software Is Better Than Home-Grown And Spreadsheet Systems

Spreadsheets:

- Can't collaborate
- Multiple files that are out of sync
- Hard to create the final investigation report
- Users manually track activity, date and time, leaving your records open to mistakes and information gaps
- Users must cut and paste information into spreadsheets from other files, resulting in high error rate
- No task assignments, alerts or deadlines
- No reporting

Home Grown:

- IT staff needed to maintain and fix
- In-house programmers required to update and fix problems
- Not purpose-built - may require work-arounds that deviate from best practices
- May not have task assignments, alerts and deadlines built-in
- May not have reporting and analytics

- Information security and privacy may not be as strong as leading case management software
- May not be configured for roles and responsibilities associated with best practice

Case Management Software:

- No need for dedicated IT staff
- No hardware expense
- No in-house expertise required for support and maintenance
- Best practices built into the system workflow
- Case activity is tracked by date and time for accountability
- All information is in one centralized case file
- Strong information security and privacy built in
- Investigators, administrators and managers can set alerts and deadlines to keep cases on track
- Integration with databases allows information to be pulled into each field, instead of having to type or paste it in

5 REASONS TO IMPLEMENT CASE MANAGEMENT SOFTWARE

1. You've identified gaps in our programs
2. Your caseload is increasing
3. Your team is expanding
4. Your regulatory environment is changing
5. You've had an incident

The Best Time to Implement Case Management Software

There are several things to consider when determining the timing for implementing new case management software. But often it's changing circumstances that drive the need for a new system.

Your Workplace is Growing: Often, the need arises because of the addition of more employees or students, which requires investigators and managers to track and organize more cases. Implementing a new case management solution as early as possible will prevent cases from falling through the cracks and will allow investigators to learn the system before their caseloads reach maximum capacity.

Your Investigation Team is Expanding: Team expansion could include the addition of more investigators, contracts, or full-time additional staff or even additional management. All of these scenarios could trigger a need for a more efficient, better

organized system for managing and documenting your investigations.

Your Regulatory Environment is Changing: Increased scrutiny by government departments for violations of harassment and discrimination and student data security put heavy pressure on education institutions to ensure their investigations are timely, thorough and well documented. An effective case management solution is part of a strong employee and public relations program, so when it becomes necessary to beef up compliance, it's time to implement case management software.

You've Had an Incident: For many educational institutions, it's painfully obvious when to implement case management software. They've experienced a incident, been involved in lawsuits or been subject to regulatory fines and reputation damage. Implementing an investigative solution sends a strong message that the organization is taking employees, students and laws seriously

Be Proactive
The best time to implement investigative case management software for your team is NOW. It's a lot easier to integrate a new investigation solution into your operations when processes are running smoothly, rather than waiting until you're scrambling to defend your organizations in the wake of an incident.

ROI

Case management software offers exceptional return in investment for education institutions and their HR teams.

- Cost avoidance – less money spent on IT and in-house programmers for upkeep.
- Cost savings – a scalable platform is less expensive to upsize or downsize.
- Increased productivity – investigators and HR professionals can get more done in less time.
- User adoption – investigators like using tools that make their jobs easier.
- Better professional performance and results – from employees who are not distracted by safety, harassment and discrimination incidents.
- Lower fines – proof of a timely, fair and complete investigation provides a stronger defense in litigation.
- Lower litigation costs – solid documentation of a thorough investigation lowers the cost of litigation and increases the chances a lawsuit will be dropped.
- Viewer incidents – access to case information helps you analyze areas of higher employee misconduct, safety issues and other risks so you can take preventive action.
- Safer environment – for employees and students alike.

COST COMPARISON:

The costs for building and maintaining a bespoke system are much higher than for implementing case management software.

Cost of Home-Grown

Software for managing workplace investigations can be complicated. In-house IT teams generally underestimate the costs of building and maintaining a complex system.

- Building a system from the ground up requires conceptualizing and designing from scratch, which is time-consuming and labor intensive.
- Cost and maintenance of in-house servers is often more expensive than hosting.
- Information privacy compliance mechanisms must be researched and incorporated.
- You'll have to purchase and maintain secure information backup systems and hardware.
- IT staff must be dedicated for the entire building phase, taking them away from other tasks.

- Continuity and maintenance can be problems when the staff who built the system leave.
- Software upgrades and support require getting into the internal IT services queue, then fighting to keep your priority.
- Penetration testing and security measures must be carried out at regular intervals, requiring IT staff time.

Cost of Case Management Software

Case management software can be a cost-effective solution for a Human Resources department. Total cost of implementing case management software covers:

- Time that would be spent researching companies, vetting proposals and attending demonstrations.
- Built-in information privacy compliance, without the need to research and incorporate it.
- A one-time setup fee, which is lower than staffing costs to build a home-grown system from scratch.

- A few hours of IT staff input to ensure compliance with your company's security and process requirements.
- A couple of weeks of staff time for implementation, spread over
- a period of two months.
- On-site or remote training to ensure your team is comfortable using their new system
- Annual licensing fees, including 24/7 support, so your IT department doesn't need to get involved.

One-on-One Advice

Our team of experts has implemented Case IQ for organizations across the globe. They're available - free of charge – to speak with you and share the best practices we've learned. No pushy sales people, no pressure, just a chance for you to learn from our experience. With a single focus on investigative case management solutions and over two decades of successful implementations, Case IQ is the global leader in configurable investigation and case management software.

TO BOOK YOUR PERSONAL SESSION, PLEASE GET IN TOUCH:

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