Managing Health & Safety Incidents with Case Management Software

An eBook for Health & Safety Teams

Case IQ

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WHY
There were approximately 2.8 million nonfatal workplace injuries and illnesses reported by private industry employers in 2017. (Bureau of Labor's 2017 Survey of Occupational Injuries & Illnesses).

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Case IQ

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

Case management software makes it easy for health and safety teams and investigators to create cases and manage multiple investigations at once. They can collect and analyze data to manage risk, reduce vulnerabilities, identify opportunities for improvement and automate OSHA reporting.

With all case information stored in a centralized database, case management software provides complete documentation of an investigation, with all actions 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 include an anonymous hotline to encourage whistleblower tips, which can be integrated with existing reporting features.

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

How Case Management Software Works:

Employees, Whistleblowers, The Public	Health and Safety Teams, Investigators	Managers, CEO, OSHA

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 and 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?

A case management solution helps organizations stay safe, healthy and compliant. A centralized case management platform that makes all case information available for reporting to key stakeholders helps companies spot hazards from recurring accidents, slips, falls, near misses, injuries, exposures and fatalities.

With case management software, organizations can analyze safety incidents by region, country, location, department, type or any other variable to spot trends and identify vulnerabilities and areas of risk. A workplace-wide solution eliminates information silos, allowing visibility into recurring issues and escalation, no matter where they occur.

If your organization is using spreadsheets, an outdated in-house system or separate single-use solutions, you are at risk. Valuable information may be falling through the cracks and you may be missing opportunities to protect your employees, your customers and your reputation.

Health-related incidents that aren't tracked, investigated and remedied can result in harm to employees and the public, and in expensive noncompliance and settlement costs.

Case management software makes it easy to meet OSHA's recordkeeping and reporting requirements. Built-in OSHA forms make it easy for you to quickly and accurately report time-sensitive incidents, reducing your risk of non-compliance.

KEEP YOUR STAFF SAFE

Nearly one-third of nonfatal occupational injuries and illnesses resulted in days away from work.

(Bureau of Labor's 2017 Survey of Occupational Injuries & Illnesses)

CASE MANAGEMENT SOFTWARE HELPS ORGANIZATIONS TO QUICKLY ADDRESS AND REPORT:

- accidents
- slips and falls
- near misses
- exposures
- fatalities

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 and provide early notice for cases that are off-track or high-risk
- create investigation reports in seconds
- conduct root cause analysis
- eliminate blind spots, reduce risk and forecast trends
- comply with OSHA reporting requirements
- demonstrate a commitment to making health and safety a workplace priority
- streamline annual OSHA (form 300A) and other reporting
- save time and money

WHY CASE MANAGEMENT SOFTWARE IS BETTER THAN THE ALTERNATIVES

Why Case Management Software is Better than Home-Grown and Spreadsheets

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 the 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 assignment, alerts and 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 assignment, 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 practices

Case Management Software

- No hardware to buy

- No in-house expertise required for support and maintenance

- Best practices built into the system workflow

- Case activity is tracked with the 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 existing databases allows information to be pulled into each field, instead of having to type or paste it in

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6 Good Reasons to Implement Case Management Software

- We've identified gaps in our health and safety programs

- Our caseload is increasing

- Our team is expanding

- Our regulatory environment is challenging

- We had an incident

- We want to prove that we value and prioritize safety

The Best Time to Implement Case Management Software

There are several things to consider when deciding when to implement case management software. Often, it's changing circumstances that drive the need for a new system.

Our Workplace is Growing: Often, the need arises because of the addition of more employees, 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.

Our Investigation Team is Expanding: Team expansion could include the addition of more investigators, contract 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 health and safety incidents and investigations.

Our Regulatory Environment is Challenging: Increased scrutiny by the Department of Labor (OSHA) for lapses of regulatory compliance put heavy pressure on organizations to ensure their investigations are timely, thorough and well documented. An effective case management solution is part of a strong employee, public relations and compliance program.

We Had an Incident: For many organizations, it's painfully obvious when to implement case management software. They've experienced a safety 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 health and safety seriously. It also demonstrates to OSHA a commitment to transparency and compliance.

Be Proactive: The best time for a company to implement investigative case management software 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 are scrambling to defend yourself in the wake of a health or safety incident.

ROI

Case management software offers exceptional return on investment for health and safety departments.

- Cost avoidance: less money spent on IT and in-house programmers for upkeep.

- Cost savings: scalable platform makes it less expensive to upsize or downsize.

- Increased productivity: health and safety investigators can get more done in less time and automate reporting.

- User adoption: investigators like using tools that make their jobs easier.

- Better professional performance and results: from employees who feel safe and secure in their place of work.

- 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 that a lawsuit will be dropped.

- Fewer incidents: access to case information that helps you analyze areas of higher risk so you can take preventive action.

- Better OSHA and Department of Labor compliance: to protect your employees and reputation.

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 documenting and investigating health and safety incidents can be complicated and in-house IT teams generally underestimate the costs to build and maintain a 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 servers in-house is often more expensive than hosting.
- Researching and complying with data privacy regulations can be complex and time-consuming.
- You'll have to purchase and maintain secure information backup systems and hardware.
- All staff must be dedicated for the entire building phase, taking them away from other tasks.
- Continuity and maintenance can be an issue when the staff who built the system leave.
- Software upgrades and support require getting into the internal IT services queue, and 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 company's health and safety department. Total cost of implementing case management software includes:

- 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 weeks of staff time for implementation, spread over the course of two months.
- On-site or remote training to ensure your team is comfortable using your new system.
- Annual licensing fees, which includes 24/7 support, so that your IT department doesn't need to be involved.

One-on-One Advice

Our team of experts has implemented Case IQ for occupational health and safety professionals across North America.

They are available - free of charge - to speak with you and share the best practices we've learned. No pushy sales people, just a chance for you to learn from our experts.

With a single focus on investigative case management solutions and a 20-year track record of successful implementations, Case IQ is the global leader in configurable case management software for investigations. To schedule a demo please visit https://www.caseiq.com/request-a-demo/.

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