



# CASE MANAGEMENT SYSTEM

# YOU MIGHT NEED A CASE MANAGEMENT SYSTEM IF...

1. You are drowning in paper
2. There is not consistent visibility across cases
3. You are using spreadsheets to manage case work
4. You have many silos
5. You deal with the swivel effect: look at this screen, then swivel to look at that screen
6. You work in the field with just a clipboard
7. Navigating through documents to find the right one takes more than a few seconds
8. Collaborating on a case means email, meetings or phone calls
9. You don't have a productive way to collect collaboration details and information
10. You have multiple solutions to address all of your case needs, each with its own log on



# TYPES OF CASES

- + Case Management exists to make the results of complex decisions as fair, fast, effective as possible

**It is applied across four types of work:**



Process to Decision



Service



Incident Management



Investigations



# PROCESS TO DECISION

## Process to Decision



### What is it?

Case types that rely heavily on structured rules and processes to coordinate case work.

### What are some examples?

- Regulatory compliance
- Routine patient care

### What are the characteristics of this type of case work?

Informed decisions depend on completing a set of known rules and processes that follow a predictable, reliable path.

### How can case management software make this type of work more effective?

Creating a single view into all tasks, actions, data, files, collaborations, and history allowing business rules to provide the required structure, as well as flexibility when needed.



# SERVICE REQUESTS

## Service Requests



### What is it?

Work that revolves around making a decision on any particular type of service and takes into consideration contractual obligations and ensures cases meet those obligations.

### What are the characteristics of this type of case work?

- Relatively high degree of structure
- Limited understanding of context
- Evolving stakes

### What are some examples?

- Claims management
- Ongoing maintenance
- Customer service

### How can case management software make this type of work more effective?

Providing instant access to complete and current information speeds decisioning. Mobilizing processes equalizes office and field workers to complete necessary tasks.



# INCIDENT MANAGEMENT



## What is it?

The process of identifying and resolving adverse incidents that mitigates organizational risk.

## What are the characteristics of this type of case work?

- Proactive; high-level process in place
- Requires flexibility
- Relies on cross-team or cross-organization collaboration

## What are some examples?

- Facility management
- Emergency response
- HR grievances

## How can case management software make this type of work more effective?

Automatic, repeatable process and business rules drive a consistent approach to similar types of incidents. Audit trails provide the history of all content, process events and collaborations in the context of the case.



# INVESTIGATIONS



## What is it?

Investigations are often a reaction to a specific event or circumstance and involve collecting and processing evidence to come to an informed decision.

## What are the characteristics of this type of case work?

- Reactive: Takes place over a large amount of time
- Little structured process
- Context that must be built from across many variables

## What are some examples?

- Accident investigation
- Legal investigation
- New product development

## How can case management software make this type of work more effective?

Convergence of all case information, including data and processes, to a single location with fast, simple access to the complete, contextual picture speeds informed decisions.



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