ER Case Management Tool

ServiceNow Proposed Refactor

ER Case Management Tool | SNow

What's Inside

Personas

Intake Specialist

Maribeth Lin

Intake Specialist | Corporate | 47 yrs old

I am an **Intake Specialist** in **Corporate** who needs to **effectively define and submit a case** so that a **Case Manager can conduct a review** and **determine a result**.

CURRENT GRIEVANCES

Quickbase
- No system interconnectivity when claims are reported
- Too much variation in the way claims are reported (email, Zoom, Word Doc)
- Case Manager is left to enter in most of the case information

SNOW
- Intake form could be more robust to reduce steps for case managers

NEEDS
- More details about Involved Parties: Email, Subject Type, Claim(s)
- Incident Date and Location
- Reported Date and Location (if different)
- Access to Non-SAP employees and employees outside of my business

Case Manager

Lainey Kirtz

Sr Manager, ER | Legacy DGE | 36 yrs old

I am a **Case Manager** in **Legacy DGE** who needs to **efficiently and accurately manage a case** so that an **appropriate outcome can be determined** and **included in reporting**.

CURRENT GRIEVANCES

Quickbase
- No system interconnectivity when claims are reported
- More fields than needed
- No access to parties outside their business unit

SNOW
- Too many clicks required
- Tabbed format is confusing and distracting
- Associations between claims, subjects, and outcomes is unclear
- Some tabs are unnecessary & tab order isn't ideal
- It's difficult to see subject's case history
- Real estate on the screen is not utilized wisely
- Nothing ever looks finalized / always seems editable

NEEDS

- Quick and easy way to add/start a new case - not scroll through a list
- Clear relations between parties, claims, and outcomes
- More efficient way to assign party type
- Ideally, no tabs - all on one page
- Simplified workflow with less clicking
- Access to parties in other businesses
- "Action Needed" or defined follow up dates when managing multiple cases at once
- Less fields - only show what we need, when we need it

VP

Kris Kizer

VP | ESPN | 54 yrs old

I am a **VP** in **ESPN** who needs to **quickly view specific case summaries** so that I **can see an overarching view of cases within a certain timeframe.**

Quickbase
—

SNOW
• Seemingly impossible to capture a summary of a case

NEEDS
• View a gather key details of a case
• Ability to export a case
• Ability to select a timeline and view cases within it

Overview

Pain Points

Disorientating Navigation

The additions of tabs throughout case management affords unnecessary complexity.

Too Many Fields

Case managers would like to see only what is required to successfully manage the case.

Valueless Clicks

The amount of clicks to perform a task is a constant area of concern.

Unfamiliar Verbiage

The nomenclature is foreign to the wording case managers are used to.

Task Variation

Case managers found that there were too many variations of completing a single task.

Opportunities
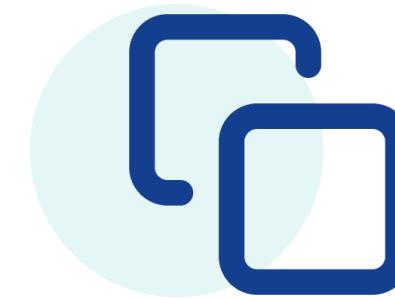
Streamline the Workflow

Render a linear mental model for case management.

Profitable Clicks

Create an environment where every step and/or click is beneficial to the case.

Clear Correlation

Make evident which claims are associated to which party and outcome.

Efficient Real Estate
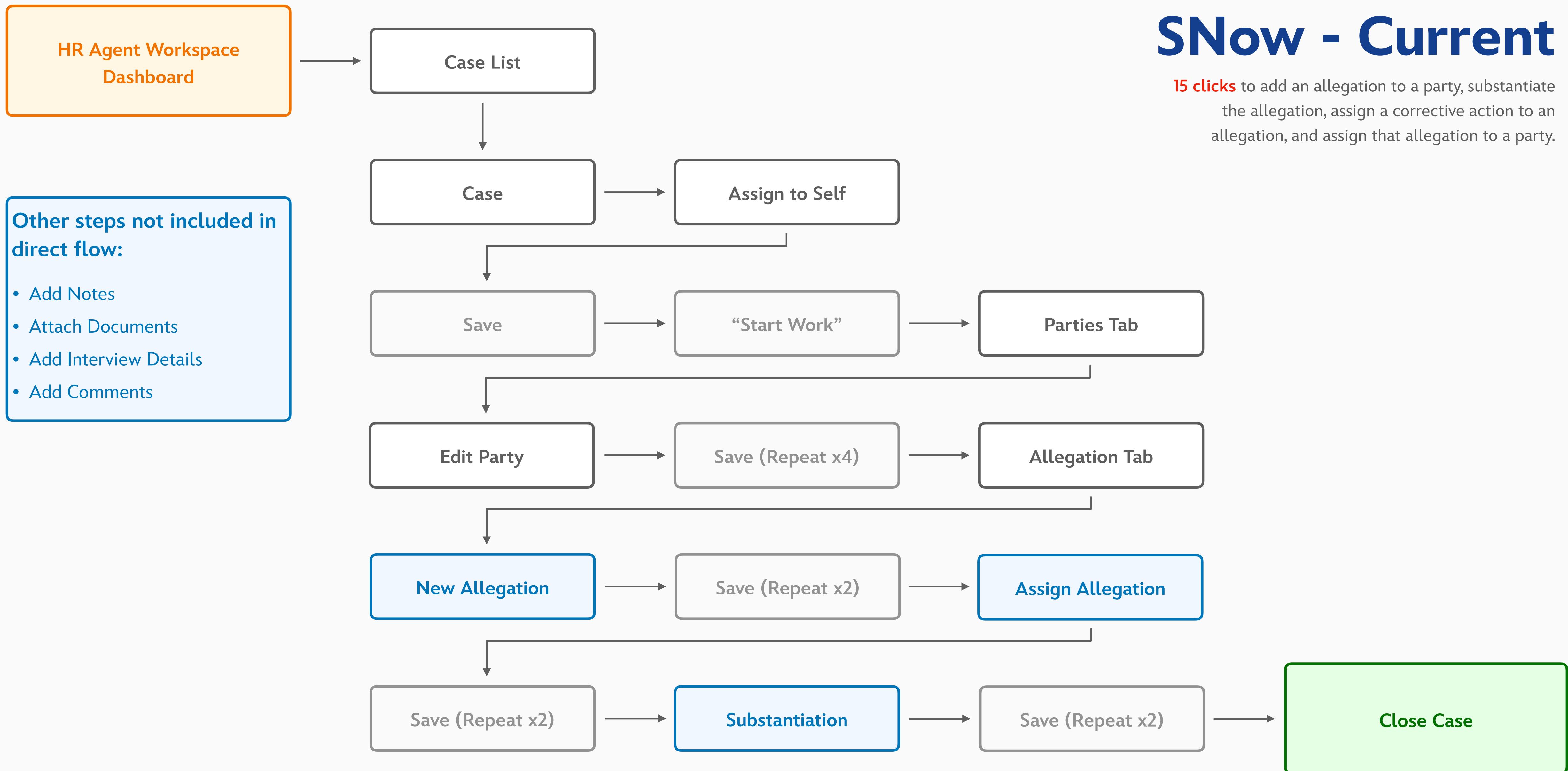
Make use of the screen's space to effectively display information and fields.

Desired Features
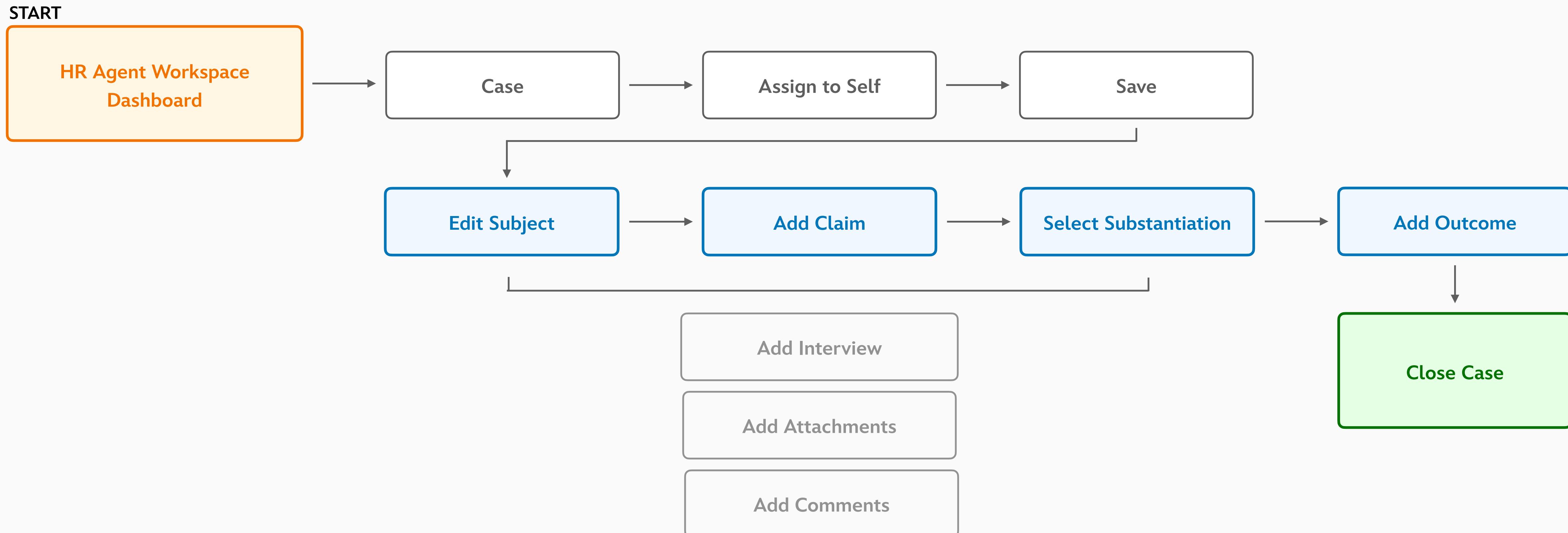
Case export, auto-save, pre-populated form fields, and Outlook integration.

SNow - Current

START

HR Agent Workspace Dashboard

Case List

Case → Assign to Self

Save → "Start Work" → Parties Tab

Edit Party → Save (Repeat x4) → Allegation Tab

New Allegation → Save (Repeat x2) → Assign Allegation

Save (Repeat x2) → Substantiation → Save (Repeat x2) → Close Case

Other steps not included in direct flow:

• Add Notes
• Attach Documents
• Add Interview Details
• Add Comments

6

Proposed Workflow

5 clicks to add a claim, findings and assign an outcome to a party.

START

HR Agent Workspace Dashboard → Case → Assign to Self → Save

Edit Subject → Add Claim → Select Substantiation → Add Outcome

Add Interview

Add Attachments

Add Comments

Close Case

HR Agent Dashboard

⌂ Home   +

2023-08-07 08:01

Hey, Sara!   Here is the snapshot of what's important.

Open items for my team

125
My team's unassigned cases

251
My team's open cases
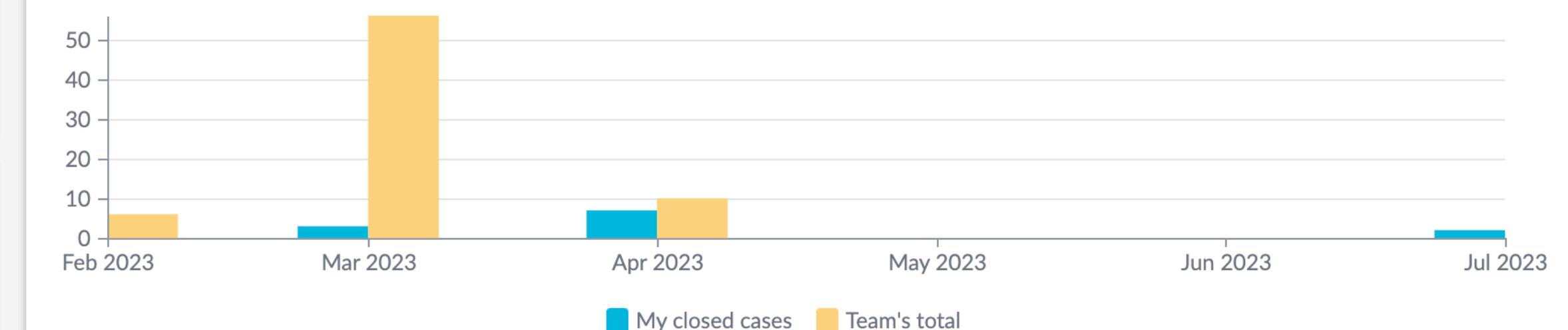
18
My Assigned Cases

99
My team's high priority cases

Cases closed over the last 6 months

50	
40	
30	
20	
10	
0	

Feb 2023   Mar 2023   Apr 2023   May 2023   Jun 2023   Jul 2023

🟦 My closed cases   🟨 Team's total

Overview

All cases

19

HRC0002219
Opened Apr 24   ⏱ 3 months breached

Report Misconduct case for Amanda Cole

Priority	State	Last updated
2 - High	Work in Progress	a month ago

HRC0002030
Opened Mar 29   ⏱ 4 months breached

Report Misconduct case for System Administ...

Priority	State	Last updated
2 - High	Ready	4 months ago

HRC0000111
Opened Feb 27   ⏱ 4 months breached

Report Harassment

Priority	State	Last updated
4 - Low	Work in Progress	4 months ago

My cases by request type

19
All cases

ER Case Manager

Search

My Cases

Search

Open Cases (17)   Closed Cases (128)

Subject(s) ⇕	Case Type(s) ⇕	Updated ▲	Opened ⇕	Status ⇕
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	In Progress
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	In Progress
Rebecca Marsh	Misconduct	04-02-2023	03-22-2023	In Progress
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	On Hold
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	On Hold
Rebecca Marsh	Misconduct	04-02-2023	03-22-2023	In Progress
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	In Progress
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	In Progress
Rebecca Marsh	Accommodations	04-02-2023	03-22-2023	Approved with Follow-up
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	On Hold
Rick Kurtz	Accommodations	04-01-2023	04-01-2023	Approved with Follow-up
Kellan Rhyms	Accommodations	03-23-2023	03-27-2023	Approved with Follow-up

‹ **1** 2 ›

+ New Case

My To Do List

☐ **Misconduct Case for Jim Parsons & Mike Webble** ✎ 🗑

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☐ **Misconduct Case for Rebecca Marsh** ✎ 🗑

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+ Add a Todo

Unassigned Cases (9)

Case Type(s) ⇕	Opened ▲
Misconduct	04-02-2023
Misconduct	04-01-2023
Misconduct	03-23-2023
Conflict of Interest	04-02-2023
Misconduct	04-02-2023

‹ **1** 2 ›

Prototype

Dashboard

My Open Cases
• Searchable
• Subject(s)
• Case Type(s)
• Updated Date
• Opened Date
• Status

My To Do List
• Curated Action Items
• Feature to require further discovery

Unassigned Cases
• Case Type(e)
• Opened Date

ER Case Manager

Search

My Cases

Search

Open Cases (17)   Closed Cases (128)

Subject(s) ⇕	Case Type(s) ⇕	Updated ▲	Opened ⇕	Status ⇕
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	In Progress
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	In Progress
Rebecca Marsh	Misconduct	04-02-2023	03-22-2023	In Progress
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	On Hold
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	On Hold
Rebecca Marsh	Misconduct	04-02-2023	03-22-2023	In Progress
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	In Progress
Rick Kurtz	Misconduct	04-01-2023	04-01-2023	In Progress
Kellan Rhyms	Harassment	03-23-2023	03-27-2023	In Progress
Rebecca Marsh	Accommodations	04-02-2023	03-22-2023	Approved with Follow-up
Jim Parsons, Mike Webble	Harassment, Misconduct	04-02-2023	04-02-2023	On Hold
Rick Kurtz	Accommodations	04-01-2023	04-01-2023	Approved with Follow-up
Kellan Rhyms	Accommodations	03-23-2023	03-27-2023	Approved with Follow-up

‹ **1** 2 ›

+ New Case

My To Do List

☐ **Misconduct Case for Jim Parsons & Mike Webble**
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad mini.

☐ **Misconduct Case for Rebecca Marsh**
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad mini.

+ Add a Todo

Unassigned Cases (9)

Case Type(s) ⇕	Opened ▲
Misconduct	04-02-2023
Misconduct	04-01-2023
Misconduct	03-23-2023
Conflict of Interest	04-02-2023
Misconduct	04-02-2023

‹ **1** 2 ›

Case Stats

+ Add Chart

Case Type Breakdown

Chart / Graph

Case Management

≡ Lists   HRC0000157   ✕   +   ⋯

Details   ⋯

Report Discrimination 🏷️

Discuss   Save   Cancel   ⋯

HR service
Report Misconduct

⌄

Details | HR Tasks | Task SLAs | Involved Parties (2) | Allegations (1) | Interviews | Evidence | Corrective Actions (1) | More ⌄

Employee Relations Case   ⌃

Number
HRC0000157

Incident Description
[   ]

☐ External opened for ⓘ

Opened for ✱ ⓘ
Carol Krisman   👤 🔍

Preferred contact method
Not Specified   ⌄

HR service ✱
Report Misconduct   ⓘ

Incident date ⓘ

State
Ready   ⌄

Priority ✱ ⓘ
4 - Low   ⌄

Source(contact_type)
-- None --   ⌄

Opened
2023-03-06 16:00:00

Opened by
System Administrator   ⓘ

Assignment group
Employee Relations   ⓘ 🔍

Assigned to ⓘ

Your employee

┌─────────────────────────────────┐
│ CK   Carol Krisman   │
└─────────────────────────────────┘

Carol's team

┌─────────────────────────────────┐
│ Department   │
│ Sales (0054)   │
└─────────────────────────────────┘

Carol's recent cases

┌─────────────────────────────────┐
│ HRC0000179   Ready   │
│ Report Fraud and Theft   │
│   │
│ Assigned to   Priority   │
│ (empty)   4 - Low   │
│   │
│ Opened Mar 10   │
└─────────────────────────────────┘

View all cases

Search

Home > Case for Jim Parsons & Mike Webble

Case for Jim Parsons & Mike Webble

Delete Case   **Save**

Case Number: HRC0003938   **Case Type(s):** Misconduct, Harassment   **Business:** Disney Entertainment Television

Opened: 07/12/2023   **Updated:** 07/25/2023

In Progress

Incident Details   ⌃

Assigned To

Melissa Garret

Reported By Channel

Email

Incident Date*

06/29/2023 12:13PM   📅

Incident Location*

[Location]

Incident Summary*

Jim Parsons and Mike Webble were seen by Sam Pericski speaking unprofessionally and inappropriately to Jess Martinez. Jess was noticeably uncomfortable. Jim proceeded to put his arm around Jess.

Resolved Date

MM/DD/YYYY 00:00   📅

Resolution Summary

⬇ Export Case Report

Keywords

Add a Keyword

Talent ✕   SH ✕

Attachments

⬆ **Upload**

Or Drag & Drop

Interview Notes 07/02/23   ⬇ 🗑 ⌄

Correspondence 07/01/23   ⬇ 🗑 ⌄

Email Thread 07/01/23   ⬇ 🗑 ⌄

Email Thread 07/01/23   ⬇ 🗑 ⌄

Correspondence 07/01/23   ⬇ 🗑 ⌄

Prototype

Static Details

Determined Automatically
• Case Title
• Case Number
• Case Type(s)
• Opened & Updated Dates

Determined by Case Manager
• Status (i.e. Work in Progress, Cancelled, Closed)
• Delete Case
• Save (+ recurring autosave every # seconds)

ER Case Manager

Search

Case for Jim Parsons & Mike Webble

Delete Case   Save

Case Number: HRC0003938   **Case Type(s):** Misconduct, Harassment   **Business:** Disney Entertainment Television
Opened: 07/12/2023   **Updated:** 07/25/2023

In Progress

Incident Details

Assigned To
Melissa Garret

Reported By Channel
Email

Incident Date*
06/29/2023 12:13PM

Incident Location*
[Location]

Incident Summary*
Jim Parsons and Mike Webble were seen by Sam Pericski speaking unprofessionally and inappropriately to Jess Martinez. Jess was noticeably uncomfortable. Jim proceeded to put his arm around Jess.

Resolved Date
MM/DD/YYYY 00:00

Resolution Summary

Case Details   Notes

Export Case Report

Keywords
Add a Keyword

Talent ✕   SH ✕

Attachments

Upload
Or Drag & Drop

Interview Notes 07/02/23
Correspondence 07/01/23
Email Thread 07/01/23
Email Thread 07/01/23
Correspondence 07/01/23
Summary 07/01/23

Incident Details

- Assigned To (Case Manager)

Provided by Intake Form
- Reported By Channel
- Indecent Date & Location
- Incident Summary

After Resolution
- Resolve Date
- Comments / Notes

Incident Details

Assigned To

Melissa Garret

Reported By Channel

Email

Incident Date*

06/29/2023 12:13PM

Incident Location*

[Location]

Incident Summary*

Jim Parsons and Mike Webble were seen by Sam Pericski speaking unprofessionally and inappropriately to Jess Martinez. Jess was noticeably uncomfortable. Jim proceeded to put his arm around Jess.

Resolved Date

MM/DD/YYYY 00:00

Resolution Summary

Involved Parties

Party Information
- Name
- Role (i.e. Subject, Witness, Complainant, HRBP)
- Case History (see slide 19)
- Employee Details (see slide 20)

If Production Employee
- Production Company
- Distributor
- Show Name
- Location

If "Subject"
- Case Type
- Findings
- Resolution Type

SUBJECT   Jim Parsons

Name*
Jim Parsons, Sr Manager, Studio IT (010992) ▾

Role*
Subject ▾

View Case History   View Employee Details

☑ Production Employee

Production Company
20th Television ▾

Distributor
Freeform ▾

Show Name
Black-ish ▾

Location
Georgia, USA ▾

Claims

Harassment: Sexual

General Case Type*
Harassment ▾

Specific Case Type*
Sexual ▾

Findings
Substantiated ▾

General Resolution Type
Termination ▾

Specific Resolution Type
Termination ▾

Involved Parties

Party Case History

• Modal View

• Searchable

• List View with the following:

  • Case Type(s)

  • Opened Date

  • Closed Date

  • Status

  • Involved Parties

Case History   ✕

Jim Parsons

🔍 Search

Case Type(s) ⬍	Opened ⬍	Closed ▲	Status ⬍	Involved Parties ⬍
Harassment	04-02-2023	04-02-2023	Closed	Rilley Jamieson
Misconduct	04-01-2023	04-01-2023	Closed	Ken Pearson, Karen Lillian
Accommodations	03-23-2023	03-27-2023	Approved	Miles Stommer
Misconduct	04-02-2023	03-22-2023	Closed	Bailey Johnson, Brian Cawdell

Involved Parties

Employee Details
- Employee Information
  - Name
  - PRNR
  - Title
  - Business
  - Org
  - Leader
  - Type
  - Union/Non-Union
  - Hire Date

Work Contact Information
- Phone
- Email
- Address

Employee Details ✕

EMPLOYEE INFORMATION

Name	**PRNR**	**Title**
Jim Parsons	010992	Sr Manager, Studio IT
Business	**Organization**	**Leader**
Disney Entertainment Television	Information Technology	Serina Parker
Employee Type	**Union**	**Adjusted Hire Date**
Exempt	No	02/13/2016

CONTACT INFORMATION

Phone	**Email**	**Address**
916-339-0029	JIM.PARSONS@DISNEY.COM	Buena Vista Plaza
		Burbank , CA , USA

Involved Parties

Non-SAP Employee

- Employee Information
  - First/Last Name
  - Title
  - Employee Type
  - Business / Region
  - Supervisor

- Contact Information
  - Email
  - Phone
  - Location
  - Production
  - Address
    - Country
    - City
    - State / Province

Non-SAP Employee   ✕

Employee Information

First Name*
Enter First Name

Last Name*
Enter Last Name

Title*
Enter Title

Employee Type*
Select Employee Type ⌄

Business / Region*
Select Business / Region ⌄

Supervisor
Enter Supervisor Name

Work Contact Information

Email*
Enter Work Email Address

Phone*
Enter Work Phone

Location Name*
Enter Location Name

Production Name
Select Production Name ⌄

Address
Enter Adress

Country
Select Country ⌄

City
Select City ⌄

State / Province
Select State / Province ⌄

Cancel   Save

Notes / Activity Log

- Track notes with Rich Text Editor (formatted text)

- Notes saved chronologically

- Notes include author, date, and time

- Ability for author to edit or delete note

Case Notes

New Note

| ↶ ↷ | Paragraph ∨ | B *I* U̲ | ≡ ≡ ≡ ≡ | ≔ ≔ ≔ ≔ | 🔗 🔗 | 🖼 | {;} <> |

Save Note

MG **Melissa Garret** · 07/04/2023 · 12:01PM PT   ✏ 🗑

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercit ation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

MG **Melissa Garret** · 07/02/2023 · 12:30PM PT   ✏ 🗑

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MG **Melissa Garret** · 06/29/2023 · 08:23AM PT   ✏ 🗑

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercit ation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

ER Case Management Tool | SNow
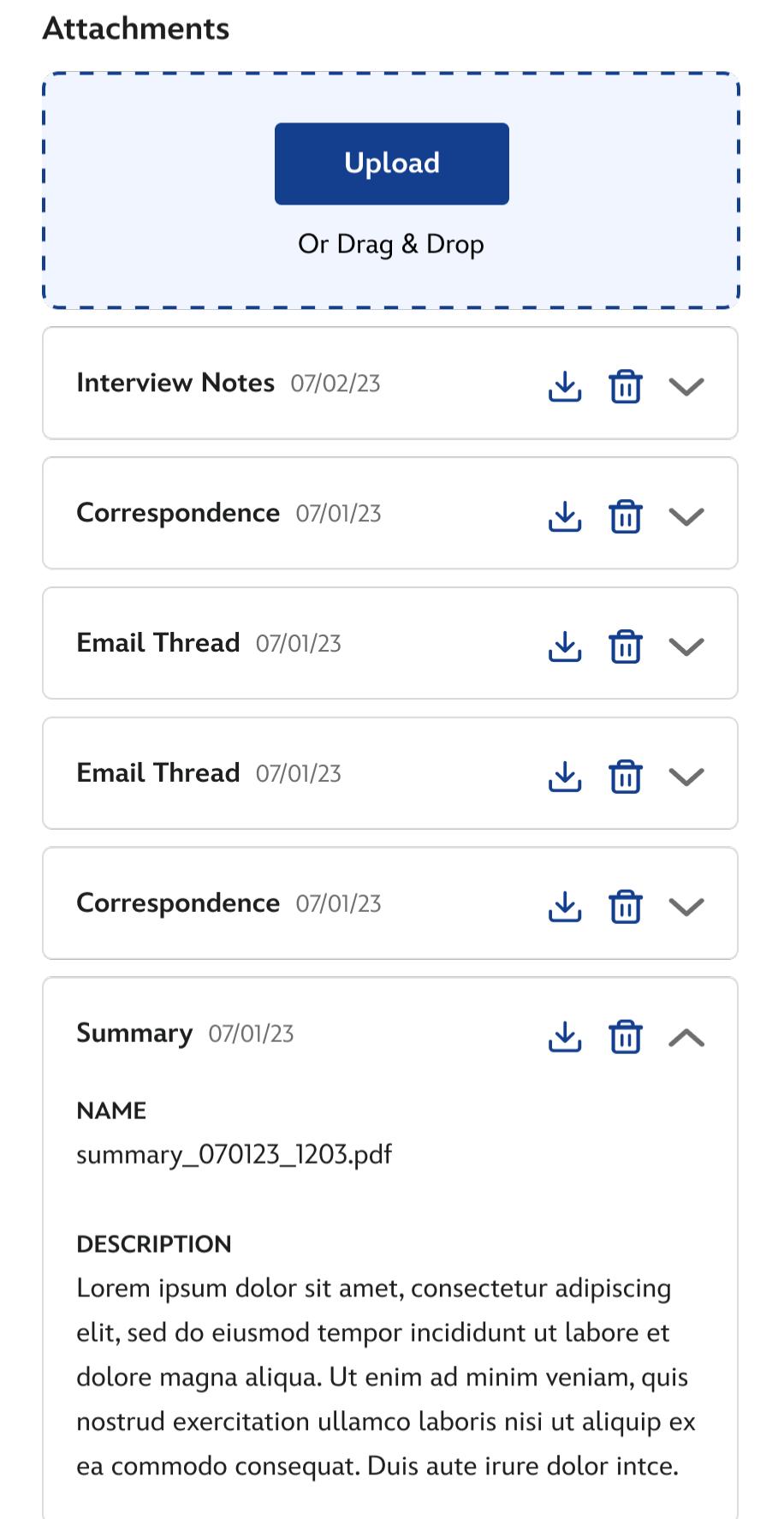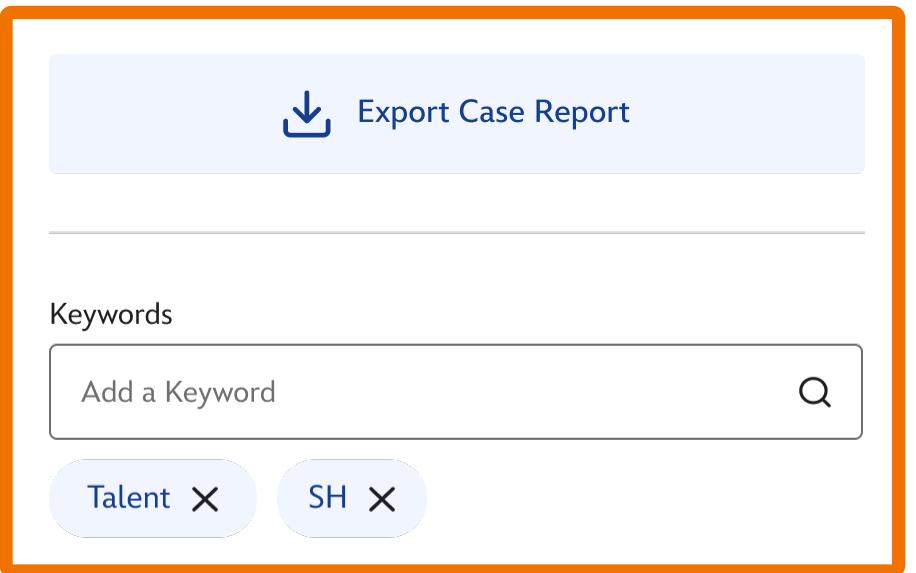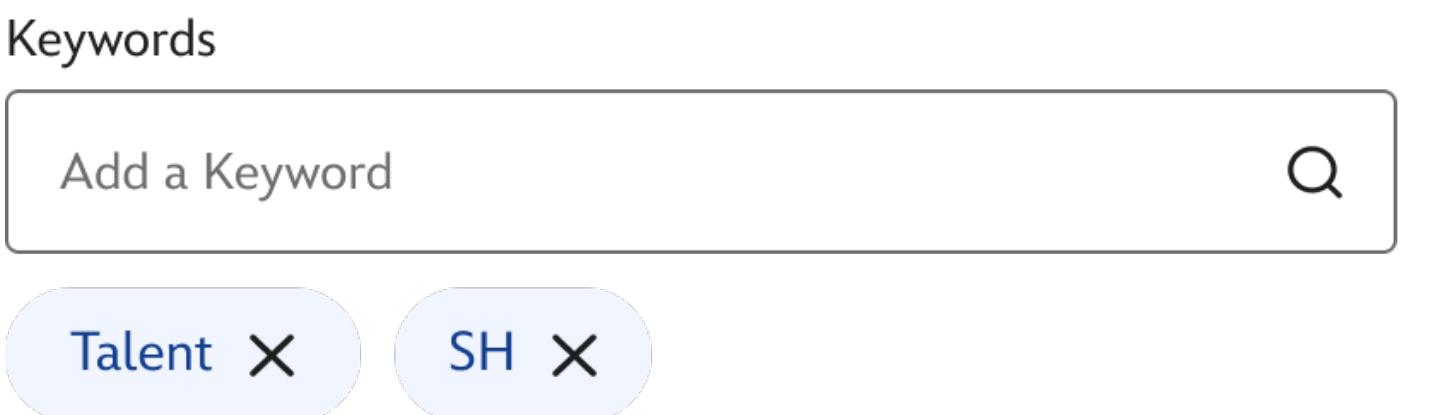
Right-Hand Actions

- **Export Case Report**
  - Downloads entire case details and attachments into a single .zip

- **Keywords**
  - Predefined keywords
  - Add/Remove
  - Indexed when searching for a report

⬇ Export Case Report

Keywords

| Add a Keyword 🔍 |

Talent ✕   SH ✕

⬇ Export Case Report

Keywords

| Add a Keyword 🔍 |

Talent ✕   SH ✕

Attachments

Upload
Or Drag & Drop

Interview Notes 07/02/23   ⬇ 🗑 ⌄

Correspondence 07/01/23   ⬇ 🗑 ⌄

Email Thread 07/01/23   ⬇ 🗑 ⌄

Email Thread 07/01/23   ⬇ 🗑 ⌄

Correspondence 07/01/23   ⬇ 🗑 ⌄

Summary 07/01/23   ⬇ 🗑 ⌃

NAME
summary_070123_1203.pdf

DESCRIPTION
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

Linked Cases

| Add a Linked Case 🔍 |

Case for Jessica Pearson (HRC0000157) ✕

Right-Hand Actions

- **Upload**
  - Drag & Drop or Upload from Computer
  - Large file sizes allowed

- **Attachments List**
  - Ordered Chronologically
  - Upload Type (i.e. Interview Notes, Correspondence, Email, Summary)
  - Upload Date
  - Download Attachment
  - Delete Attachment
  - Details Viewable upon Collapse/Expand

Attachments

Upload

Or Drag & Drop

Interview Notes 07/02/23

Correspondence 07/01/23

Email Thread 07/01/23

Email Thread 07/01/23

Correspondence 07/01/23

Summary 07/01/23

NAME
summary_070123_1203.pdf

DESCRIPTION
Lorem ipsum dolor sit amet, consectetur adipiscing

Export Case Report

Keywords

Add a Keyword

Talent ✕   SH ✕

Attachments

Upload

Or Drag & Drop

Interview Notes 07/02/23

Correspondence 07/01/23

Email Thread 07/01/23

Email Thread 07/01/23

Correspondence 07/01/23

Summary 07/01/23

NAME
summary_070123_1203.pdf

DESCRIPTION
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

Linked Cases

Add a Linked Case

Case for Jessica Pearson (HRC0000157) ✕

Right-Hand Actions

- **Linked Cases**
  - Select & Link correlating cases
  - Ability to Remove Linked Cases

Linked Cases

Add a Linked Case 🔍

Case for Jessica Pearson (HRC0000157) ✕

Export Case Report

Keywords

Add a Keyword 🔍

Talent ✕   SH ✕

Attachments

Upload

Or Drag & Drop

Interview Notes 07/02/23

Correspondence 07/01/23

Email Thread 07/01/23

Email Thread 07/01/23

Correspondence 07/01/23

Summary 07/01/23

NAME
summary_070123_1203.pdf

DESCRIPTION
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor intce.

Linked Cases

Add a Linked Case 🔍

Case for Jessica Pearson (HRC0000157) ✕

ER Case Management Tool | SNow

Closed Cases

- **Read-Only**
  - Static Details
  - Incident Details
  - Case Details

- **Actionable Items**
  - Export Case Report
  - Add Keywords
  - Upload/Manage Attachments
  - Link Correlating Cases

ER Case Manager

Search

Home > Case for Jim Parsons & Mike Webble

Case for Jim Parsons & Mike Webble

Save

Case Number: HRC0003938   **Case Type(s):** Misconduct, Harassment   **Business:** Disney Entertainment Television
Opened: 07/12/2023   **Updated:** 07/25/2023   **Resolved:** 08/13/2023

Incident Details

Assigned To

Melissa Garret

Reported By Channel

Email

Incident Date

06/29/2023 12:13PM

Incident Location

[Location]

Incident Summary

Jim Parsons and Mike Webble were seen by Sam Pericski speaking unprofessionally and inappropriately to Jess Martinez. Jess was noticeably uncomfortable. Jim proceeded to put his arm around Jess.

Resolved Date

08/13/2023 5:12PM PT

Resolution Summary

Case Details   Notes

SUBJECT   **Jim Parsons**

Name

Jim Parsons, Sr Manager, Studio IT (010992)

Role

Subject

View Case History   View Employee Details

Claims

Harassment: Sexual

General Case Type

Harassment

Specific Case Type

Sexual

Closed

Export Case Report

Keywords

Add a Keyword

Talent ✕   SH ✕

Attachments

Upload

Or Drag & Drop

Interview Notes   07/02/23

Correspondence   07/01/23

Email Thread   07/01/23

Email Thread   07/01/23

Correspondence   07/01/23

Interview Notes   07/02/23

Correspondence   07/01/23

Requirements

Requirements - DASHBOARD

Above the Fold

- *Prominent* list of **My Open Cases**
- **"Add New Case"** button
- *Smaller* list of **My Tasks**
- *Smaller* list of **Unassigned Cases**

Below the Fold

- Generalized Charts & Data
  - **Cases by Request Type**
  - **# of Cases Closed**
  - **# of Open Cases**

REMOVE

- Announcements
- Quick Links
- Frequently-Used Apps

Requirements - CASE MANAGEMENT (UI)

Key UI Requirements

- Case Details
- Involved Parties
- Attachments
- Keywords

REMOVE (Tabs)

- HR Tasks
- Task SLAs
- Allegations
- Interviews
- Evidence
- Corrective Actions
- Attached Knowledge
- Approvers
- Child Cases
- Allegation Outcomes

REMOVE (Sections)

- Case timeline
- All right-hand panel options except for attachments

Requirements - CASE MANAGEMENT (UI)

Case Details

- Case Number
- Incident Description (Rename to "Incident Summary")
- HR Service (Rename to "Case Type")
- State (Rename to "Status")
- Assigned To
- Source (Rename to "Reported By Channel")
- Opened Date
- Incident Date
- Short Description (Rename to "Case Title")
- Description (Rename to "Resolution Summary")
- Comments/Worknotes (Rename to "Notes")

Involved Parties

- Display Name (Rename to "Employee Name")
- Type (Rename to "Employee Type")
- Allegation (Rename to "Case Type")
- Allegation Outcome (Rename to "Findings")
- Corrective Action (Rename to "Resolution")

Requirements - CASE MANAGEMENT (UI)

Non-SAP Employee

- First Name
- Last Name
- Title
- Employee Type
- Business/Region
- Supervisor
- Work Email
- Work Phone
- Location Name

- Production Name
- Address
- Country
- City
- State

Production Employee

- Production Company
- Distributor
- Show Name
- Location

Requirements - CASE MANAGEMENT (Functionality)

Key Requirements

- All fields reportable
- Autosave capability
- Outlook integration
- Export Cases capability

File Uploading

- Allow large files
- Allow various file types (i.e., .zip and .ics)
- Drag & Drop

Requirements - CASE MANAGEMENT (Functionality)

Dropdowns, wherever possible

- Keywords
- State (Rename to "Status")
- Source (Rename to "Reported By Channel")
- Preferred Contact Method
- HR Service (Rename to "Case Type")
- Type (Rename to "Employee Type")
- Allegation (Rename to "Case Type")
- Allegation Outcome (Rename to "Findings")
- Corrective Action (Rename to "Resolution")

- "Production Employee" Fields
  - Production Company
  - Distributor
  - Show Name
  - Location

- "Non-SAP Employee" Fields
  - Employee Type
  - Business/Region
  - Production Name
  - Country
  - City
  - State

Requirements - CASE MANAGEMENT (Functionality)

Autofilled / Imported Fields, wherever possible

- Case Number

- State (Rename to "Status")

- Incident Description (Rename to "Incident Summary")

- Source (Rename to "Reported By Channel")

- Opened

- HR Service (Rename to "Case Type")

- Incident Date

- Short Description (Rename to "Case Title")

- Display Name (Rename to "Employee Name")

- Type (Rename to "Employee Type")

- Allegation (Rename to "Case Type")