Unfortunately, dozens of scenarios like the following one play out day after day at organizations across the globe:

Sarah is a human resources (HR) manager for a hospital system in the West. In addition to her regular duties handling payroll and benefit issues for 45,000 employees, she’s also temporarily handling employee complaints and policy questions for Mary, a colleague who went on early maternity leave without briefing Sarah on her open cases.

On the first day of Sarah’s newly extended responsibilities, three employees requested updates on open complaints. Sarah consulted her organization’s HR information system but couldn’t find all of the details she needed to answer the inquiries. So she searched the talent management system but was met with the same result. Then she asked the employees themselves to forward any email exchanges they had with Mary regarding their complaints. She also asked Mary’s supervisor to provide her with hardcopy case files so that she could look through the notes. Sarah even scavenged through the documents stacked on Mary’s desk, hoping to find anything of use.

Despite meticulously combing through the emails, the files and the stacks of documents, Sarah still couldn’t find all of the information necessary to process the inquiries, so she scheduled appointments with all three of the employees to discuss their cases personally. In the meantime, two new status requests came in from other employees—one of whom is an individual in a protected class facing termination and claiming that other employees have not been fired for the same offense. As if that weren’t enough, Sarah’s boss requested that she put together a presentation for the executive team regarding her plans for minimizing payroll costs in the coming year.

End the Employee Relations “Scavenger Hunt” with HR Case Management Software

Maintain your comprehensive employee relations data in a single, reliable and secure source—and end the mad scramble for critical information.
Sarah has spent so much time dealing with the employee complaints that she’s behind on her own work—and she still isn’t sure about what to tell the first three employees about the status of their cases. With no alternative in sight, Sarah dials Mary’s home telephone number, hoping that Mary will be available and can provide the guidance she desperately needs.

This is just one example of a multitude of situations that can send HR and employee relations (ER) personnel into scavenger hunts for critical information. And all too frequently these hunts end in frustration and some degree of failure. While the situations may vary, the basic reason for these scavenger hunts is often the same: critical information is not gathered and maintained in a single and secure repository. Instead, it’s spread across the organization in disconnected databases, spreadsheets, emails, voice mails, paper files and other electronic and paper-based formats.

Even HR information and talent management systems don’t usually solve the problem, as they’re not built to gather, integrate and track all of the data needed to handle the wide variety of ER cases that arise in any organization—cases that span employee complaints, disputes, full-blown grievances, harassment situations and other confidential matters.

The good news is ... there is a solution that can put an end to these employee relations scavenger hunts. That solution is an HR case management system.

An HR case management system provides several significant advantages:

- **It serves as a central, secure repository** for all ER information—onboarding data, asset management, employee inquiries, grievances, and more. This ensures that everyone needs to consult just one source when searching for data, and it eliminates much of the potential for error that is inherent to the use of spreadsheets and other tools. It also enables HR and ER to see who is “touching” each case.

- **It gives HR/ER the ability to identify trends** and gain insight into the root causes of the most prevalent employee complaints and case types. This helps employers link similar types of grievance cases to one another and better address related concerns and issues. It also gives employers an accurate, up-to-date snapshot of key issues and where they are occurring within the organization (geographically, functionally, departmentally, etc.).

- **It enhances HR’s/ER’s timeliness and efficiency** in viewing, tracking, categorizing and responding to issues by integrating with legacy HR management and information systems.

- **It offers a reliable tool for employee self-service**, including enabling employees to communicate officially with HR, open a case, find answers to common questions, access company policies and practices, receive support during onboarding, etc.—all of which helps to boost employee engagement, satisfaction and retention. Equally important, it also enables new HR advisors to search for similar cases and learn how they were handled rather than having to consult a superior or another advisor. This ensures that they
can provide reliable, consistent answers and solutions.

In short, an HR case management system is built specifically to give you the data and insights your organization needs to make better business decisions, achieve better outcomes and manage costs more effectively.

So, how would that same scenario above play out if Sarah’s organization had implemented an HR case management system?

Because all of the documentation related to Mary’s employee complaints, as well as any other employee issues being tracked, are now in a centralized HR case management system, Sarah can easily and quickly locate all of the information necessary to process the inquiries and deal with the cases in an efficient and timely manner—before the situations escalate.

In addition, she can search the knowledge base for how similar cases were handled in the past and provide answers accordingly. And since the system contains a documented process for handling employee inquiries regarding disciplinary action/termination, Sarah is able to review the process and take the next appropriate step in handling those types of inquiries as well.

Now, when Sarah’s boss requests that she create a presentation regarding her plans to minimize payroll costs in the coming year, she has the time and the ability to focus on putting together a quality presentation with a sound business case. And instead of calling Mary for last-minute guidance, Sarah calls her to see how she and her baby are doing!

It’s time we stop engaging in ER scavenger hunts that put our organizations at risk of costly litigation and unnecessary turnover. By implementing an HR case management system, we can reap the rewards of a single, reliable tool designed specifically to help us better manage and leverage our human capital.

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An HR case management system helps you to make better business decisions, achieve better outcomes and manage costs more effectively.

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**About Dovetail Software:** Dovetail Software delivers web-based case management and help desk software that manages and tracks employee interactions with HR—including employee grievances and general policy questions, payroll and benefits, recruiting-related questions and compliance issues. Dovetail customers cite cost reduction of supplying support, increased productivity, access to complete records of employee interactions with HR, and visibility into analytics that help them improve their processes as key product benefits. For more information, visit [www.dovetailsoftware.com](http://www.dovetailsoftware.com).