



CASE MANAGEMENT FOR IMIS – COSTS AND OPTIONS

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CASE MANAGEMENT

Through intelligent use of the standard tools in iMIS, Karapoti Consulting have provided a number of iMIS clients with comprehensive Case Management systems.

Our Case Management implementations include -

- Complaints management
- Dispute resolution services
- Member recruitment (unqualified prospect through to paid-up member)
- Sales pipeline
- Member resignation process
- Consultation process

Our Case Management solutions allow membership organisations to raise cases against clients and track the cases through a sequence of actions through to a conclusion.

Case actions may be assigned between staff or across business units. Files may be uploaded against cases and case actions. Times are recorded and metrics gathered to allow workflows and staff workloads to be analyzed, throughputs to be constantly monitored and contractual requirements such as escalation points and email notifications to be honoured.

A full audit trail is maintained for legal discovery purposes.

Dashboard stats provide at-a-glance case status overviews at both case worker and management levels.

And our Case Management solutions are future-proof – it is *not* a custom bolt-on solution; it is simply a series of intelligently-built pages utilizing some of the lesser-known features of out-of-the-box iMIS.

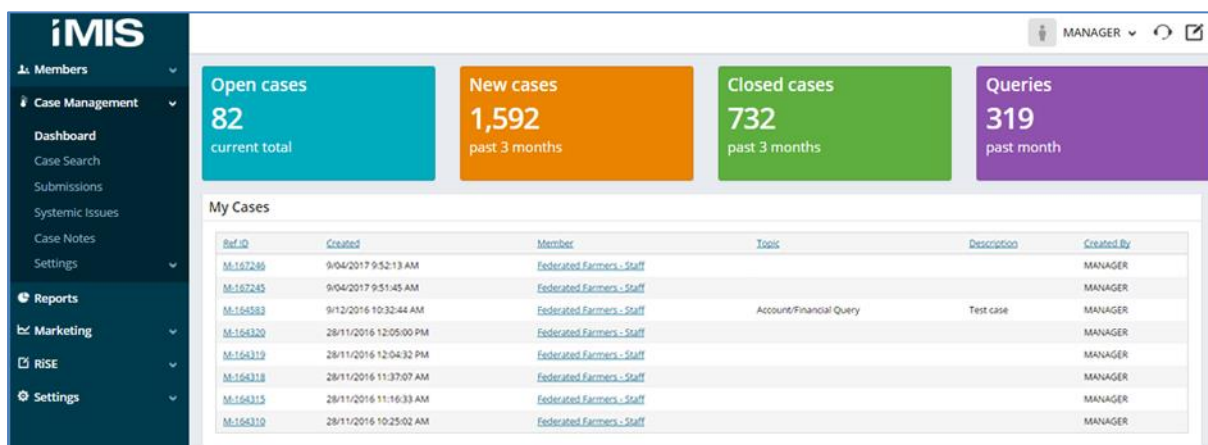
IMIS Requirements

Our case management solutions are built on the iMIS Staff View and are not available in the traditional iMIS desktop. Prerequisites are –

- The client must be running an iMIS300 instance with access to the server (we need to add a document storage folder for file uploads and stored procedures to the database)
- iMIS version 20.1 or later
- iMIS Advanced Process Automation

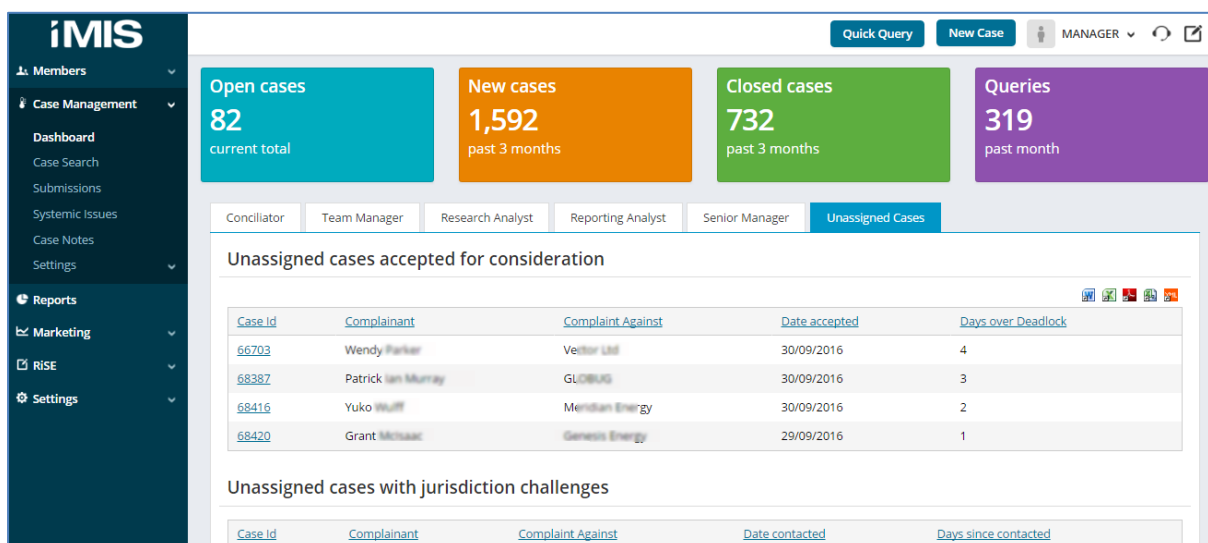
CASE MANAGEMENT DASHBOARD

The **Standard Dashboard** lists the open cases for the current staff member -



The **Advanced Dashboard** lists the cases for the current staff member, plus

- management statistical reports, and
- listing of all open cases by team(s)



Against each member record there is a full case history for that member -

Ref ID	Topic	Sub Topic	Description	Stage	Status	Created
AV-165886	Account/Financial Query	Subscriptions	refund member	Resolved	Closed	17/02/2017 9:18:47 AM
282-170888	Subscriptions	Resignation	Resignation	Resolved	Closed	24/09/2014 1:19:37 PM
276-140900	Subscriptions	Registration	resign	Resolved	Closed	11/02/2013 1:08:43 PM
262-112929	Order	Contracts/Agreements	order	Resolved	Closed	27/05/2011 9:40:00 AM
196-109135	Order	Remuneration Survey	Order	Resolved	Closed	28/03/2011 11:14:00 AM
196-109132	Order	Contracts/Agreements	Order	Resolved	Closed	28/03/2011 11:11:52 AM
238-108947	Subscriptions	Subscriptions	2011 sub paid twice in error - refund	Resolved	Closed	24/03/2011 9:54:36 AM
223-104932	Subscriptions	Subscriptions	updated address	Resolved	Closed	16/12/2010 3:21:00 PM
236-98056		Legal	Contracts	Resolved	Closed	4/05/2010 9:46:56 AM
223-98055		Employment	contract query	Resolved	Closed	4/05/2010 9:40:54 AM
196-95867	Subscriptions	Subscriptions	Unapplied cash	Resolved	Closed	1/03/2010 8:19:43 AM
134-92445		Sharemilking	50 50	Resolved	Closed	27/10/2009 12:07:59 PM
142-85235		Website Assistance	Can't access website	Resolved	Closed	14/04/2009 9:54:35 AM
142-85229		Member chose to call 0800 line back	Problem with Balloon landing on proptert	Resolved	Closed	14/04/2009 9:36:21 AM
142-70382		Legal	Verbal Agreements with Farm Owner	Resolved	Closed	16/05/2008 5:01:24 PM
52-49398		Diary Order	2007	Sent	Closed	2/04/2007 2:17:03 PM

INDIVIDUAL CASE OVERVIEW

Each **Case Overview** panel shows at a glance -

1. Primary case details
 - a. Member Company and contact;
 - b. Classification;
 - c. who it is assigned to;
 - d. current case status
2. List of Actions raised against the case
 - a. Action type,
 - b. When raised, and by Who
3. List of files uploaded against the case

Case

<p>Membership No. 154304</p> <p>Company A & B Ltd</p> <p>Phone 01 234 5678</p>	<p>Person Jane</p> <p>Phone 01 234 5678</p>
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Details

Ref ID 303-195123

Topic

Sub Topic Local

Source Phone

Category

Description Enviro Sthland-Compliance query

Details tfd call to Tanith

Created 25/11/2016 11:30 AM

Created By Janine

[Note](#)

Assigned To Tanith

Stage Resolved

Status Closed

Close By

Closed 16/01/2017 10:27 AM

Resolution
Executive discussed the issue that their meeting and will put it on list on things to raise with ES.

Tracking

Details	Note	Date	Created By
Stage changed to Resolved	Executive discussed the issue that their meeting and will put it on list on things to raise with ES.	16/01/2017 10:26:30 AM	Tanith
Stage changed to Investigating	I called Jane. her primary concern was the lack of notice given before ES compliance visits, as well as Health and Safety issues if ES officers come on-farm without supervision of farm owner. ES considered the notification timeframe at a Council meeting last year and agreed to retain 15-30 minute notice. They also got a legal opinion stating there is no problem with ES compliance officers going on-farm alone. I have forwarded Jane the information form ES, and have told her I will raise it at the next Executive meeting as an issue that potentially could be raised again with ES, esp in light of the new Council.	1/12/2016 11:55:52 AM	Tanith
Case logged	tfd call to Tanith	25/11/2016 11:30:21 AM	Janine

Files

Attached File	File Type	Uploaded	Edit	Remove
Notification of Dairy Inspections.pdf	pdf	1/12/2016 12:00:17 PM	Edit	Delete
2015 November 25 - Regulatory Committee Appendices.pdf	pdf	1/12/2016 12:00:18 PM	Edit	Delete

Click on each of the listed **Case Action** items to open in a new panel to view full details.

CASE ACTIONS

The **Case Action Panel** allows an Action Type to be specified (for tracking purposes), notes to be recorded, files to be uploaded, the case status to be noted and the case to be assigned to another staff member.

Edit action

<< Previous Next >>

Action 91

Details

Action Type:

Date:

Title:

Text

To: [redacted]@co.nz; Role: [redacted]@sys.co.nz
Subject: [redacted] response to [redacted] complaint

Good morning [redacted] and [redacted] staff,
I have attached [redacted] response to [redacted] complaint. [redacted] has rejected the Commissioner's proposed recommendation.
The attachments include:
- Cover letter - Response forms - Redacted submission - [redacted] Terms and Conditions 2014
I have redacted [redacted] submission to protect the privacy of another complainant. In paragraph 6.30 and 6.31 of [redacted] submission, [redacted] refers to [redacted] as a different complainant that also has a complaint currently under consideration. I spoke to both [redacted] and [redacted] who was referred to in the [redacted] submission and both parties agree redacting the submission was the best way to protect the privacy of the other complainant.

Design HTML Previ...

Status:

Is Significant:

Document URL:

Attach Files

Enter Brief Description (optional):

Select File: No file chosen

Attached Files

- 56444 [redacted] cover letter.PDF
- 56444 [redacted] response form - [redacted].pdf
- 56444 [redacted] submission REDACTED.pdf
- 56444 [redacted] Terms and Conditions 2014.pdf

These actions build up a case tracking history that provides at-a-glance case tracking for reporting.

REPORTS

The **Standard Case Management** option provides each staff with an individual dashboard report listing their open cases, and the duration of each. This is a standard IQA report that may be customized or extended by the Client for their specific requirements.

The **Advanced Case Management** option provides

- Individual reports of open cases assigned to each staff;
- General report of open cases assigned to all staff (for management);
- Team reports of open cases for staff within each team (for team leaders);
- Case Duration report showing total time spent on cases;
- KPI report showing Staff loading.
- Case stats reporting – month-on-month case resolution times and case throughputs

CASE ALERTS, ESCALATIONS AND NOTIFICATIONS

Organisations usually have a requirement to monitor and track cases, escalating when open for too long or when a critical stage is reached.

The Standard Case Management option presents each staff member with an individual dashboard report showing time open for each case. Escalation is done manually.

The Advanced Case Management option includes alert options when pre-set Case Open time thresholds have been reached or critical Action Types are raised. The alerts may be

- Dashboard alerts appearing on the Management Dashboard
- Automated email alerts to Case Managers

COSTS AND OPTIONS

SUMMARY OF OPTIONS

Feature	Standard Case Management	Advanced Case Management
Dashboard	Single dashboard	Multiple dashboards
Reports	Individual reports of open cases assigned to each staff;	Individual reports of open cases assigned to each staff; General report of open cases assigned to all staff (for management); Team reports of open cases for staff within each team (for team leaders); Report showing total time spent on cases; Report showing Staff loading.
Case Actions	Action panel with user-configurable Action Types	Action panel with user-configurable Action Types
Case Notifications and Escalations	Through standard IQA report	Standard IQA Reports Dashboard Alerts Automated emails

COSTS AND IMPLEMENTATION

The **Standard Case management** carries the basic feature set and should be adequate for the majority of iMIS clients who require a simple set of actions against a member and a single dashboard report.

The **Standard Case Management** carries a fixed-price cost of \$6,500. This excludes any data migration of historic cases.

The **Advanced Case Management** option is suited to more comprehensive case management, disciplinary proceeding and complaint management. Where cases have a legal bearing and must meet constitutional requirements we recommend this option

The final cost of the **Advanced Case Management** option will depend on the specific client requirements. For budgetary purposes the cost will likely be in the range of \$9,000 to \$24,000. Again, this excludes any data migration of historic cases.

All prices are in NZD and exclude any applicable GST.

Each implementation will be tailored to the client's specific requirements. A requirements-gathering exercise will be undertaken as a preliminary, on-site wherever practical.