

Case Study

Union County Public Schools

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Streamlines Processes and Eliminates
Bureaucracy and Paperwork.

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Steve Simpson
Investigator

UCPS
UNION COUNTY PUBLIC SCHOOLS

Project Overview

Union County Public Schools Streamlines Processes and Eliminates Bureaucracy and Paperwork

UCPS investigates policy violations and harassment claims before they become bigger problems.

The Challenge

The investigation team at UCPS determined that they needed a secure system with tight privacy controls. They needed a platform that enabled offsite data management to eliminate the risk of server failures, storage issues and backups. They wanted a system that was easy to use, with responsive customer support and a guided intake process to capture the right information via drop-down lists. They needed the ability to upload video files to the case file, as well as the ability to generate templated closure letters for parents and victims of sexual harassment. In order to increase transparency, they needed a system with notifications to alert investigators when new incidents are entered.

The Solution

After doing extensive internet research, Simpson and his team found Case IQ, read testimonials from happy customers and decided that Case IQ had the security, flexibility and efficiency that the UCPS was looking for. Case IQ provides mechanisms to set levels of access to ensure information security. Reporting provides detailed oversight and accountability. The ability to link cases helps UCPS to identify and address areas of risk in the district. The Case IQ team provided suggestions and guidance throughout the system build to ensure UCPS got the exact solution they needed.

Paper Claim Forms Left Investigators With Little to Analyze

Union County Public Schools (UCPS) is the sixth-largest public school system in North Carolina. It serves 41,500 students at 53 schools and has approximately 5,000 staff members.

The school system didn't have a streamlined system for reporting employee policy violations and sexual harassment claims for the district. Investigators were reporting using paper forms to answer just 14 questions. With limited information being collected and no digital storage, it was difficult to analyze the claims.

To improve data collection and processes, UCPS adopted an off-the-shelf system that was online but limited in scope.

Coming from Law Enforcement, where they had a powerful online tool for logging and reporting on cases, Simpson saw the potential for vast improvement in the management of investigations. "We wanted something that was customizable and cost effective," he says.

"With 53 schools, all with principals and assistant principals, we needed something that allowed them to make reports," says Simpson. "And we wanted something that was really user-friendly. With all they already have to do we didn't want to burden them with something that required a lot of training."

The investigation team at UCPS determined that they needed a secure system with tight privacy controls, the option of offsite data management to eliminate the risk of server failures, storage issues, and backups, and an easy to use guided intake process to capture the right information via drop-down lists. They also needed the ability to upload video files to case files and generate templated closure letters for parents or victims of sexual harassment.

"There was no reporting and it wasn't secure. Everyone could see information in the system. It wasn't customizable, and there was no way to link or cross-reference cases."

-Steve Simpson,
Investigator

Flexibility, Security, and Efficiency were a Game Changer for UCPS

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To answer the need for security, Case IQ provides mechanisms to set levels of access to ensure that everyone doesn't have full visibility into case information. "They get an external link where they can just put information into the system without having to log in and see other cases," says Simpson. Having a "read-only" designation and levels of access ensures that each person can see only the case information they need and changes can only be made by those who are permitted to make changes.

Simpson also appreciates the detailed oversight that Case IQ provides. Another game-changer for Simpson's team is the ability to link cases. Being able to flag repeat harassers, or see multiple complaints about the same employee or issue is invaluable to UCPS and helps them to identify and address areas of risk in the district.

And the team's need for exceptional customer service and support has been fulfilled. "Case IQ has been really responsive to our needs and great at giving suggestions and guidance when we were setting up the system," he says.

Case IQ has been a huge time-saver for UCPS, providing efficient and quick access to detailed case information, much of which was simply not available previously, says Simpson. "When you get a request you can just do a quick search and all the cases come up in front of you immediately. In five minutes it's done," he says.

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Easy Case and History Retrieval Helps Prevent Larger Problems

Simpson also appreciates the depth of information that is now available and the organized storage of all case-related information. “You don’t have to go to 14 different places to find what you need.” The ability to upload videos to the case file and access them immediately has eliminated issues with emailing or transferring large files, which often meant saving them to a device to be delivered to the recipient.

Case IQ’s reporting has been especially valuable to Simpson’s team. These reports help UCPS to monitor and address issues before they become larger problems. “For example, in transportation, we can see whether there are multiple issues with the same driver or at the same time of day or night or in the same location,” says Simpson. “Then we can decide if we need to provide more training.”

As a state agency it’s hard to quantify cost savings, but Simpson credits Case IQ for streamlining its processes and cutting out bureaucracy and paperwork.

Investigate and Prevent Workplace Misconduct with Case IQ

Case IQ helps you investigate, prevent and protect your company from fraud, harassment and compliance lapses to lower risk for your organization.

Find out more about how Case IQ can help your team conduct more effective investigations and prevent ethics and compliance lapses.

Book a demo:

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