

Employee Relations Tracking System for Your Organization

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What is an Employee Relations Tracking System?

An employee relations tracking system is a case management software that enables HR to track and manage their employee and labor relations cases within a secure, collaborative environment. It is sometimes referred to as an HR Case Management system, since there is often no clear demarcation between labor relations and HR-related cases - Employee Relations cases often start as an employee case for HR and turn into ER cases after more information becomes known. For example, questions about payroll, benefits or HR policy, may turn into labor relations grievance cases that will need to be tracked and managed by HR.

[Employee Relations Case Tracking Demo](#)

Employee Relations Tracking Systems help ER and Investigator teams implement Employee Relations processes that are:

- **Transparent** – the ER process is documented and made available to employees so that they understand the process (a case management system with Employee Portal is particularly useful here)
- **Consistent** – the Employee Relations process is the same for every case, regardless of the agent(s) involved. Case management tracking software helps you stay consistent
- **Timely** – especially for investigations, the speed at which a case is initiated can be a critical legal determinant. Employee Relations software helps speed up the Investigation process by providing fast and easy access to documents and ensuring Investigators stick to deadlines
- **Auditable** – documents and activities can be produced and stored in a central system and, when necessary, shown to be complete and un-altered

Benefits and Features of an Employee Relations Tracking System



An Employee Relations case tracking system for employee relations case management issues has significant advantages over a paper-based case management system or Human Resources Excel spreadsheet templates, providing a number of ways of improving employee relations. These include:

Centralized Tool for all Your Employee Relations Tracking Needs

Dovetail provides a single, flexible tool that meets all your employee relations and labor relations case management needs, including the tracking of employee issues, within one centralized tool. In addition to a user-friendly interface that HR teams can easily navigate and collaborate on cases, Dovetail has a powerful, yet easy-to-use, rules engine. The engine allows HR teams to configure workflows to support any type of HR or ER case management process. Best of all, the administration can be performed by HR teams without the need for additional IT resources.

Employee Relations Case Tracking Demo **Fast and Easy Case Creation and Assignment**

Whether cases are being manually created and assigned or automatically being set up and dispatched, Dovetail Employee Relations software has it covered. Cases are automatically created whether received through email, chatbots, live chat, Employee Portal, or APIs. Based upon the source, cases are automatically categorized. For example, as an email dedicated to Payroll questions, or upon keywords in the content of the case information provided. This means HR teams are empowered to configure automation within the case management system that helps them with common tasks, such as case assignments.

Robust Roles and Permissions

Dovetail includes a robust roles and permissions system that ensures case access is limited to appropriate roles within the Employee Relations team. For example, you can have a different investigations process for US-based employees, where you may want to publicly distance yourself from accused employees, to other countries outside the US, where you may wish to implement a different process.

Enables Secure Investigator Collaboration

Dovetail provides a highly granular, role-based permissions management system, to ensure HR teams have control over what access and visibility users have in cases. This allows Employee Relations cases to be easily separated from other types of HR cases. ER cases can even be restricted to key individuals within the HR team.

Easy Access to Case Evidence and Documentation

Dovetail Employee Relations case management software enables all of your communications and case documents to be kept within the case file. All notes and emails are entered directly within the case. In addition:

- All email responses are automatically added to the case record, which means Dovetail users never have to go outside of the Employee Relations case management tool to manage dedicated HR email boxes
- Relevant files can be uploaded to the case for easy access, either for reference or as attachments to emails during the case lifecycle

Helps Investigators Stick to Deadlines

Dovetail's Employee Relations case management system enables you to configure event rules to set notifications that are associated with various case events. These notifications can serve as update communications or simple reminders. Child cases can also be generated as case sub-tasks, either for tracking purposes or for assigning to other users. For example, if your legal department needs to review a case as part of the investigation process, a sub-task can be assigned to legal to complete after HR has collected the relevant documentation and carried out the initial interviews.

Seamless HR Database Integration

Dovetail integrates with HRIS systems, typically through nightly data feeds, so that employee information is available for an automatic population of case data. In addition, Dovetail case management enables customers to add data or even combine data feeds from multiple sources to provide information in a single summary view (information that might have required an HR user to open multiple HRIS screens or even access multiple systems), which ensures the HR team has a complete picture of the employee's situation, role, team, pay, etc, by simply entering their name. This saves valuable time, speeding up the assessment process.

Dovetail can leverage this information and populate templates used in case notes or emails, as a way to eliminate keystrokes and speed up repetitive actions for our customers.

Employee Relations Case Tracking Demo Case History, 360 Degree Views, and Case Connections

Dovetail provides views of all case history for individuals, and the ability to filter, based upon whether the cases were reported by the employee, or were reported by other individuals relating to the employee concerned. In this way, you can easily check for simple issues such as duplicate cases. If the concern is a history of ER-related cases against an employee, HR teams have the ability to filter on cases reported about the

concerning employee. In this way, HR can easily determine whether there has been a history of similar cases - which may indicate a pattern of behavior that may provide evidence for new cases.

Unlimited Reporting, Analytics & Trend Analysis



Dovetail provides a report module with over 70 reports that enable customers to show trends in case types or filter by location, department, agent, employee, union, or any other criteria. There is no limit to the number of reports customers can generate. Reports can be scheduled to run regularly and automatically distributed to individuals/groups, in order to continually update HR with trends and variations. Tracking employee relations case data is made easy.

Complete Visibility of Employee Relations Workload for Managers

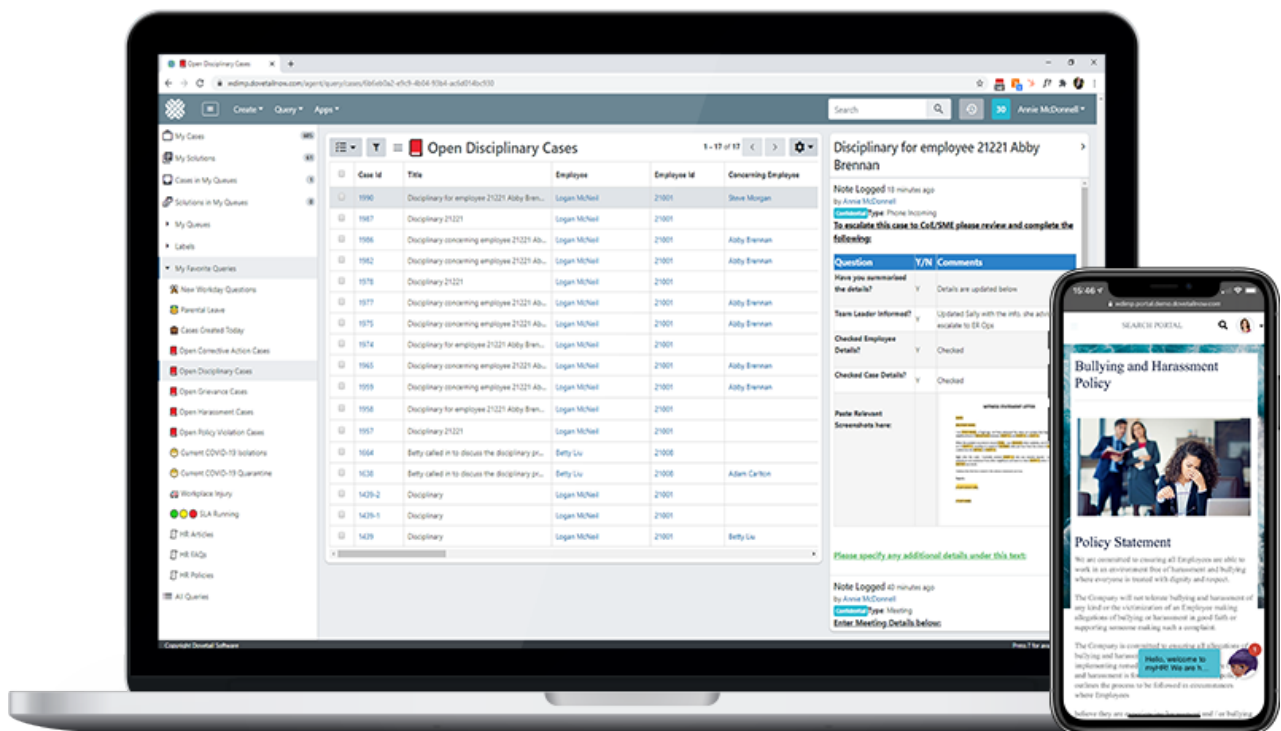
When your team is working on multiple cases, you may find you don't have the time to check the progress of each individual case. You believe your team to be reliable, but what if on occasion they're not. This could result in unexpected lawsuits, fines, or even a high-performing employee leaving the company.

Dovetail's Employee Relations software provides you with the visibility you need of your team's workload, with features such as alerts of overdue tasks, activity timelines, and details of who has worked the case, as well as configurable Service Level Agreements (SLAs) with escalation process (that can automatically notify and reassign cases as you wish). In this way, you can track and manage your Investigators' cases, and stay on top of your team's workload.

Access Employee Relations Cases Anytime, Anywhere

Thanks to Dovetail's responsive web development (RWD), our case management system interface automatically adjusts to the user's screen size across multiple devices, enabling easy access to cases from phones and tablets from anywhere, at any time.

Harassment Case Handling Process Options



If you have a process for how you want to handle harassment cases, Dovetail Employee Relations software has a significant number of configuration options to map out any notifications, approvals, or Service Level Agreements (SLAs) that you would like to build into the life of a labor relations case. This enables you to have a different process for a minor dress code violation vs. a sexual harassment claim.

Employee Relations Templates

Dovetail's Employee Relations templates promoted consistent language in HR and employee communications, such as providing standard legal language or instructions for agent guidance.

Employee Relations Case Tracking Demo **Why Implement Dovetail Software with Employee Relations Case Tracking Capabilities?**

There are a number of reasons why you should choose Dovetail Employee Relations software for your organization. Take a look at [Dovetail's Employee Relations Management Software in 2022 blog post](#) for a list of 11 benefits and/or read [10 Reasons Why Your Organization Needs Employee Relations Software Today](#).

However, there are several benefits that differentiate the Dovetail Employee Relations software offering from other providers, including:

- Employee Relations requires establishing corporate initiatives and communications, an area where [Dovetail's Employee Communications Portal](#) has many advantages. Many organizations are communicating Employee Relations content via traditional means such as email. By moving ER communications to Dovetail's Employee Portal, an organization can significantly improve its employee relations communications and reduce the risk of employees claiming a 'lack of knowledge'
- Dovetail offers a highly flexible solution that is perfect for organizations who need a solution that supports both [HR Case Management](#) & Employee Relations case requirements
- Unlike some other Employee Relations software providers, Dovetail Software has data centers located across a number of regions, including the US and Europe, enabling you to stay within your region's data privacy regulations
- Access to reliable employment law and good practice guidance on Employee Relations cases through [our partner XpertHR](#), ensuring HR compliance and reduced risk of litigation

To find out more, why not book a demo of [Dovetail Employee Relations case management software](#), with employee relations case tracking system capabilities, today?

Employee Relations Case Tracking Demo

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