

CASE DETAILS

Include the general details of the case in this section.

Case Name: _____ Case Closed Date: _____
Case Open Date: _____ Notification Date: _____
Notification Method: _____ Case Location: _____
Case Number: _____

CASE TEAM

Include the specific team members on the case and their roles in both this case and your organization.

Name:	Title:	Role:
_____	_____	_____
_____	_____	_____
_____	_____	_____

ISSUES

Describe the specific issues that led to this case being created, along with a category for it.

1. Category: _____
Description: _____

2. Category: _____
Description: _____

RELEVANT DOCUMENTS

Common documents that might be noted include Employee Code of Conduct, Conversation History, Privacy Policy, Receipts, etc.

File Name: _____ Date Uploaded: _____
Specifics: _____ Uploaded By: _____
Reviewed:

INVOLVED PARTIES

The specific parties involved in this case along with their information and whether they are a subject, a witness, or complainant.

Name: _____

Hire Date: _____

EID: _____

Department Code: _____

Title: _____

Function: _____

Role: _____

Current Perf Rating: _____

Primary Manager: _____

Subject: Witness: Complainant:

Name: _____

Hire Date: _____

EID: _____

Department Code: _____

Title: _____

Function: _____

Role: _____

Current Perf Rating: _____

Primary Manager: _____

Subject: Witness: Complainant:

CASE HISTORY

Make note of any key steps that were taken in the course of investigating this case.

Date: _____ Added by: _____

Details: _____

Date: _____ Added by: _____

Details: _____

CASE SUMMARY

Describe the conclusions you reached after conducting the investigation, and why.

ACTIONS

The specific actions taken to resolve this case, along with follow-up / after-care.

Involved Party: _____ Action: _____

Issues: _____ Date Taken: _____

Specifics: _____