HR-CRM Navigation
for Client Services

User guide
October 2014

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Client Services Introduction to CRM

Customer Relationship Management (CRM) is a method for managing customer contact. It was developed from a commercial perspective where businesses needed a way to keep track of their customers, the customer's contact information and interactions that occurred with these customers. CRM is not new. Businesses were managing the relationships they had with their customers long before the intervention of the computer. However, in our computer-driven culture if you hear the term CRM, it is usually in conjunction with a software application. The CRM software application that WSU has implemented is Salesforce.

Salesforce, as the name implies, was developed for processing customer sales. Although WSU Human Resources Division does not sell products to customers, it does provide services to clients/customers. Who are HR's clients/customers? WSU employees, prospective employees, students and those who are affiliated with the University.

Effective November 2014, HR Consultants will need to begin using CRM to track employee relations issues (for both represented and non-represented employees). The criteria for the employee relations issues that need to be documented in CRM are as follows (one or more conditions below are present):

- Employee makes a complaint of unfair treatment or harassment
- An immediate resolution is not known or feasible without further research
- Issue presented requires formal investigation
- Resolving issue requires a partnership with Office of Equal Opportunity, Labor Relations, Office of General Counsel or Payroll

CCRM Format

Subject: Department/Division

Reporter: Name or Anonymous

Reportee(s): Name(s) or N/A

IPAC

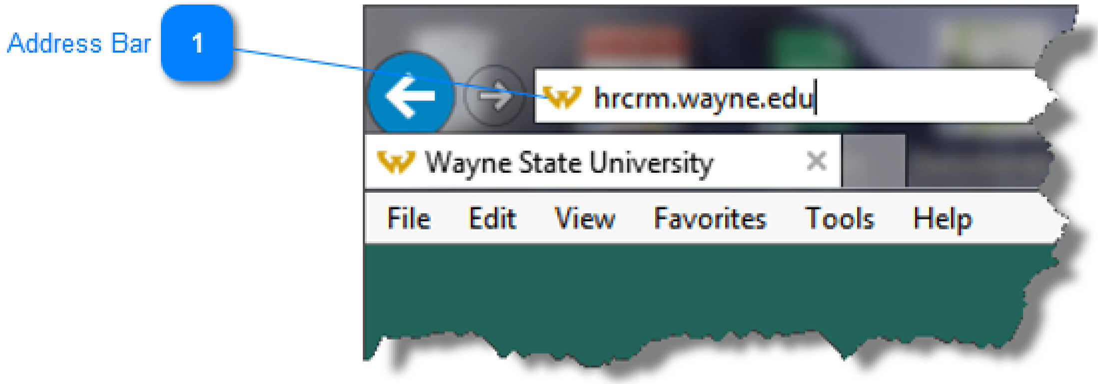
Issue: What is the problem (statement)? What happened or failed to happen? What does the individual want? What is the problem? This should be two (2) to four (4) brief sentences.

Policy: Identify the Policy, department guideline, or practice associated with the issue.

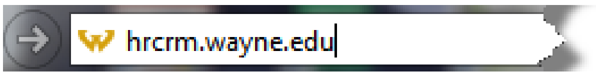
Analysis: What was the relationship between the facts and the policy? What was the impact? Who was involved? Were those involved aware of the policy or should they have been aware? What has been past practice?

Conclusion: What was the final outcome of the case? What was the decision and why? This is a brief statement.

Log into Salesforce



1 Address Bar



Enter the URL **hrcrm.wayne.edu** into your browser address bar. Hit the Enter key or click the Go button. A login prompt will display.

There are two configurations of the log in prompt. Which one displays will be dependent on whether or not you have an AccessID authenticated (e.g. Pipeline, Webconnect, Blackboard, etc.) session open in the same browser. If you have an authenticated session open, single sign-on is invoked. If not, you must log in with your AccessID and Pipeline password.

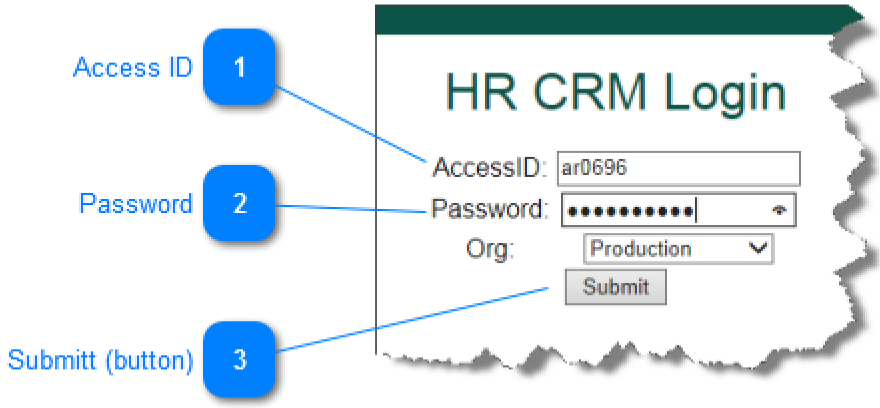
Logging Into Salesforce With Single Sign-on

If you are currently logged into Pipeline, Webconnect or Black board, single sign-on is invoked. Enter hrcrm.wayne.edu into your browser address bar and hit Enter. The login prompt above will display.

1 **Submit (button)**

Click the **Submit** button to launch Salesforce.

Logging Into Salesforce With AccessID and Password



Enter the URL **hrcrm.wayne.edu** into your browser address bar and hit Enter. When you are not logged into Pipeline, Webconnect or Blackboard, the login prompt above will display.

1

Access ID

Enter your WSU AccessID and tab to the **AccessID** field.

2

Password

Enter your Pipeline password into the **Password** field.

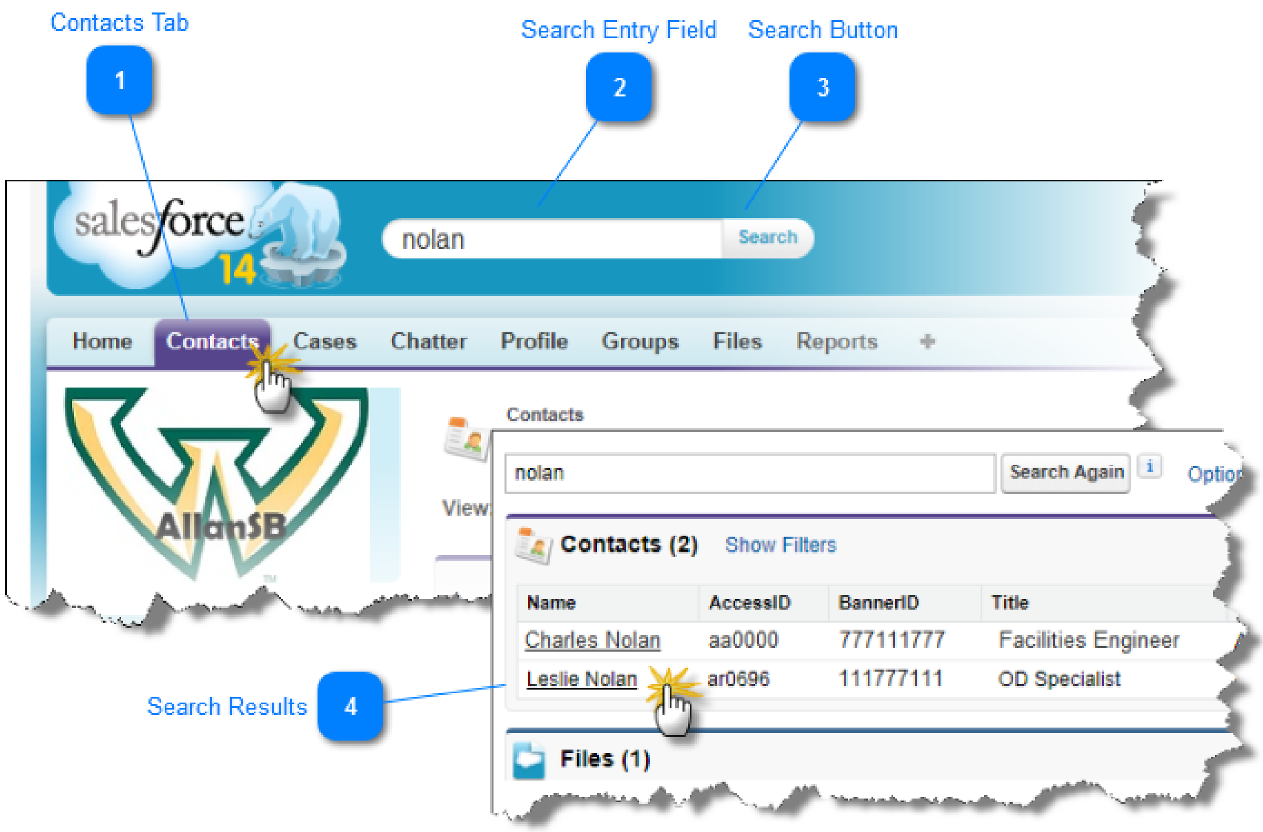
3

Submitt (button)

Click the Submit button to launch Salesforce.

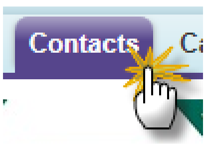
Locating an Employee's Contact Information

The first time you attempt to locate an employee's contact information after logging in, you must use the Search function at the top of the screen. Subsequent searches can be performed from the search box that displays with the results of your initial search.



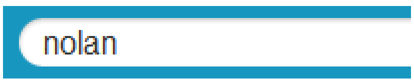
After obtaining the employee's WSU Access ID or his/her last name:

1 **Contacts Tab**



Click the **Contacts** tab *(unless already selected)* to locate the contact information for a WSU employee.

2 **Search Entry Field**



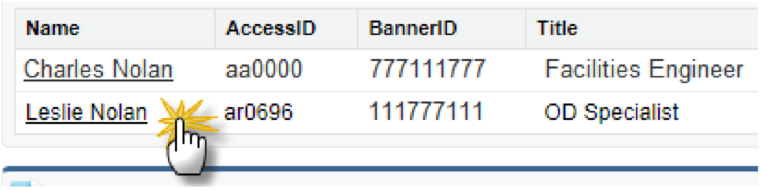
Enter the employees last name in the **Search** box.

3 **Search Button**

Click the **Search** button to initiate the search.

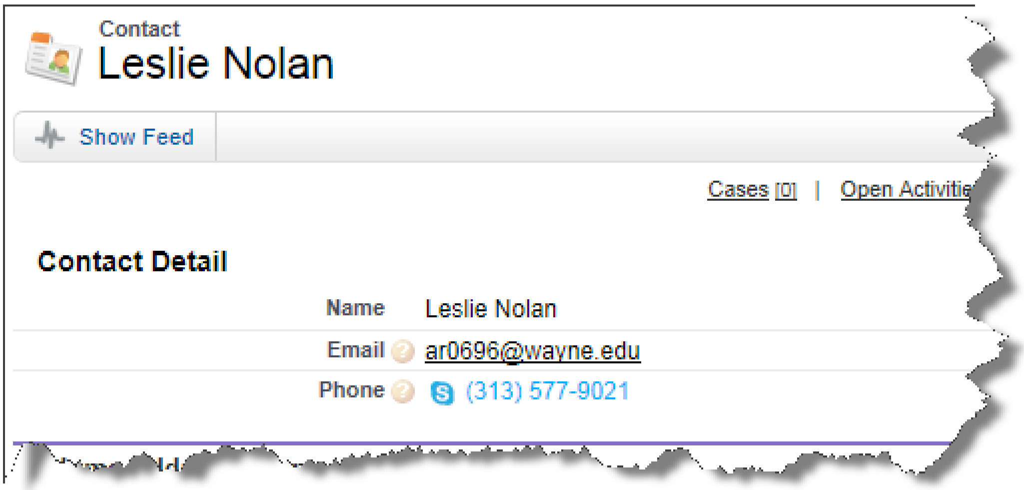
4

Search Results



This search produced two results, click the appropriate employee's name to open his or her contact information.

The contact information for this employee will display.



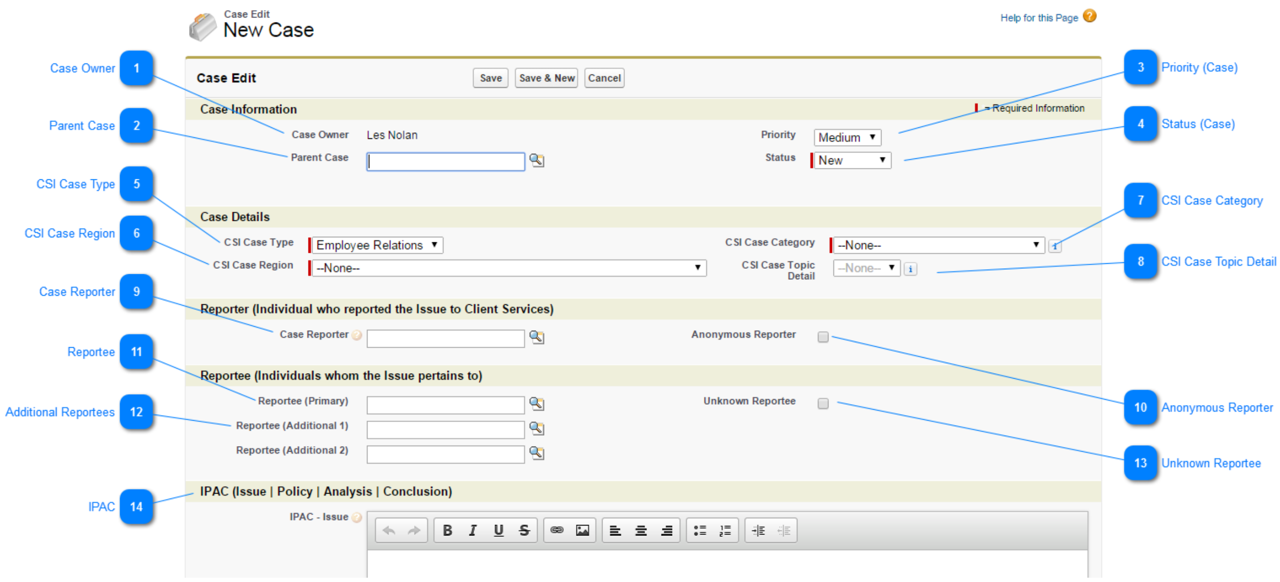
Working With Cases

Issues brought to the attention of Client Services are documented by creating a case in Salesforce. Salesforce then becomes the respository for all employee relations issues and the resolution for each of the issues within a region.

The case contains the following information:

- The case number
- The case owner (person responsible for providing a solution/response to the contact.
- Case status, a description of the issue, the date the case was created, and how the case came to the Client Services.
- Case comments, case history, and any related cases.
- If the case is closed, how the case was resolved.
- Attachments (supporting documentation) that may have been applied to the case.

New Case Template



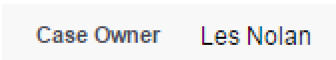
A Client Services Investigation (CSI) case is divided in to four sections:

- Case Information
- Reporter (individual you reported the issue)
- Reportee (individual(s) whom the issue pertains to)
- IPAC (Issue/Policy/Analysis/Conclusion)

Case Information Section

1

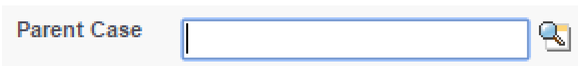
Case Owner



Because you are creating the new case, you (by default) are the **Case Owner**.

2

Parent Case



Occassionally, an issue may arise that is closely related to an existing case but is not close enough to be included with the existing case. In this instance, a secondary case can be created and linked to the existing case by placing the existing case number in the **Parent Case** field.

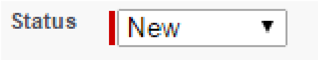
Reporter Section

3

Priority (Case)

For reporting and informational purposes, this field allows you to prioritize the importance of the case in terms of high, medium, and low priority.

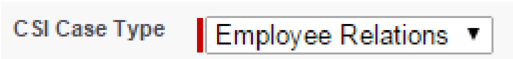
4 Status (Case)



The Status field provides status indicators to identify the progress of a case. The options are:

- **New** (default)
- **On Hold** (indicates action on this case is pending)
- **Escalated** (case has been marked as escalated for documentation purposes)
- **Closed** (case has been resolved; no further action required)

5 CSI Case Type

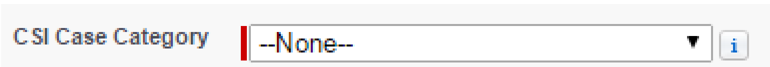


Within Client Services, the **Case Type** is always **Employee Relations**. Although this field appears to have a drop-down menu, there are no other options. This field is also used as a filter when running case reports.

6 CSI Case Region

The **Case Region** field identifies the Client Services Region and the School, College, or Division where the issue occurred. This field is also used as a filter when running case reports.

7 CSI Case Category

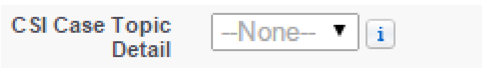


Case Category identifies the general classification of **Reporter** involved in the issue. In a situation where the **Reporter** wants to remain anonymous or is unknown, use the category of the **Primary Reportee**.

- NRNA (Non-Represented, Non-Academic)
- NRA (Non-Represented, Academic)
- RA (Represented, Academic)
- RNA (Represented, Non-Academic)
- Other

This field is also used as a filter when running case reports.

8 CSI Case Topic Detail



Case Topic Detail identifies the type of issue the case deals with. The options are:

- FMLA
- RIF
- Attendance
- Recruiting/Hiring
- Performance Mgt.
- Disciplinary
- Discharge
- Training
- Position Classification Issues

- Employee Complaints
- Student Complaints
- Policy Compliance
- Litigation Prep/Assistance
- Reorganization/Position Creation
- Pay/Compensation
- Systems (OHS, EPAF, I-9 eXpress, etc.
- S/C/D Meetings

This field is also used as a filter when running case reports.

9 Case Reporter

The **Case Reporter** is the individual who reported the issue.

10 Anonymous Reporter

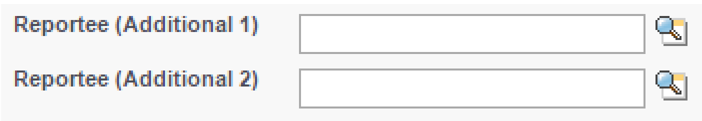
If the Case Reporter wants to remain anonymous, click the **Anonymous Reporter** chech box.

Reportee Section

11 Reportee

The **Reportee (Primary)** is the primary employee referred to in this issue.

12 Additional Reportees



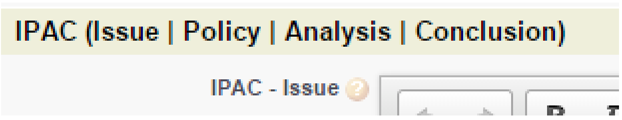
Additional Reportees (1 and 2) who may also be involved with this issue are added here.

13 Unknown Reportee

If the issue involves an **Unknown Reportee** (employee), place a check in the check box.

IPAC Section

14 IPAC



There are four sub-sections to the **IPAC** section:

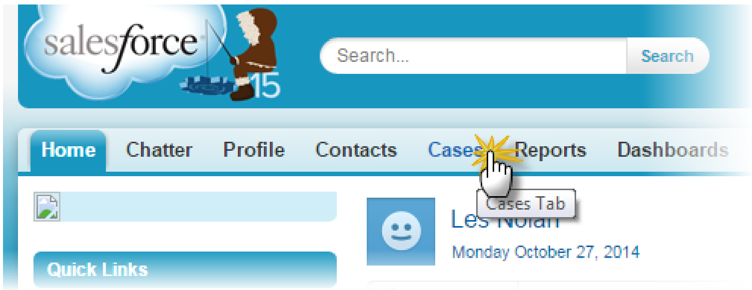
- **Issue** (problem statement)
- **Policy** (University policy, department guideline or practice)
- **Analysis** (detailed investigation of the issue)
- **Conclusion** (final outcome/decision)

Each sub-section has its own text area. Although these text areas seem quite large, the areas will adust to fit the entered text.

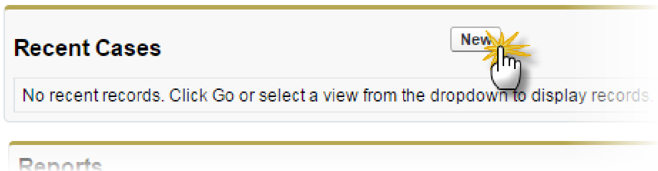
Creating a New Case

After logging into **Salesforce**, follow these steps:

1. Click the **Cases** tab on the tab bar.



2. After the **Cases** tab displays, click the **New** button located in the **Recent Cases** section.

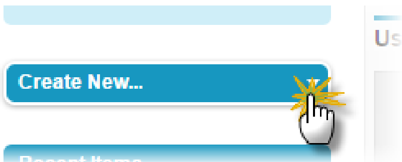


3. A **New Case** template will display.

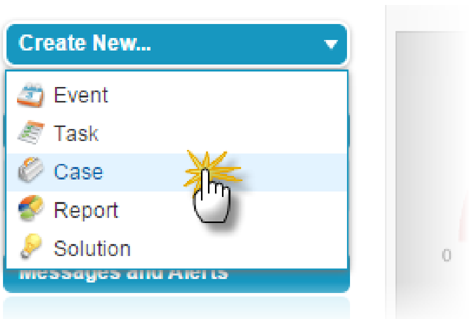
Alternative Method for Creating a New Case

After logging into **Salesforce**, follow these steps:

1. On the **Home** tab, click **Create New** in the navigation panel on the left of the screen.



2. When the drop-down menu displays, click **Case**.



3. A **New Case** template will display.

Entering Data Into a New Case

The data contained in Scenario 1 will be used in this example. A summary of the issue follows:

Summary: The incident occured in a University Library. Two employees, Jessica Jones and Caroline Smith, were involved in a physical altercation. Jones pushed Smith to move her out of the way. Smith asked Jones to stop touching her. Jones acknowledges putting her hands on Smith.

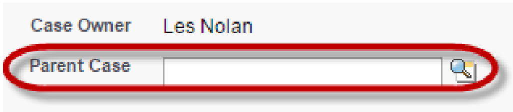
Case Information Section

The data contained in Scenario 1 will be used in this example. A summary of the issue follows:

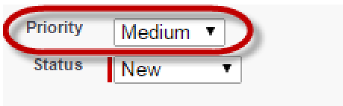
Summary: The incident occured in a University Library. Two employees, Jessica Jones and Caroline Smith, were involved in a physical altercation. Jones pushed Smith to move her out of the way. Smith asked Jones to stop touching her. Jones acknowledges putting her hands on Smith.

After logging into Salesforce and creating a new case, use the data gathered on your CCRM to populate the data fields on the new case.

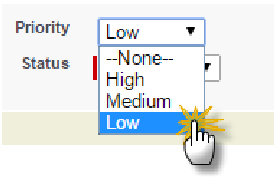
1. If this new case is closely related to an existing case, but is different enough to warrant its own, unique case, enter the case number of the existing case in the Parent Case field.



2. Set the **Priority** of the case as needed. The default is **Medium**.

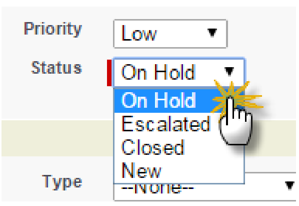


3. Click anywhere in the **Priority** field to display the drop-down menu. The options are High, Medium and Low.



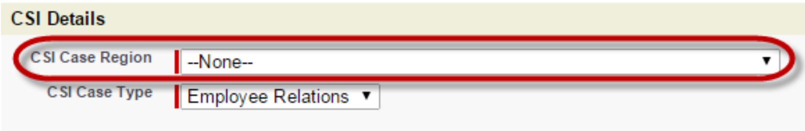
4. Set the **Status** of the case as needed. The default is **New**.

5. Click anywhere in the **Status** field to display the drop-down menu. The options are New, Closed, Escalated and On Hold.

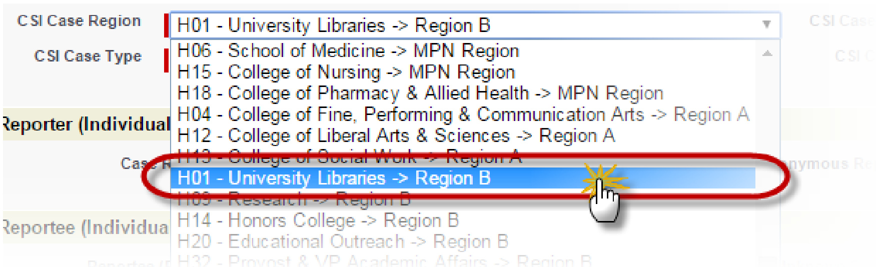


CSI Details

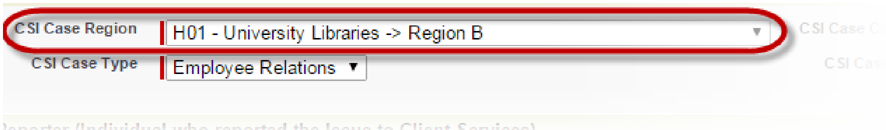
1. Select the **CSI Case Region**.



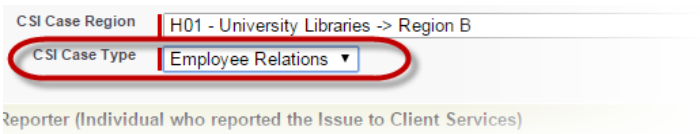
2. Click anywhere in the **CSI Case Region** field to display the drop-down menu and select the appropriate S/C/D for your region.



3. The S/C/D will be entered into the field.

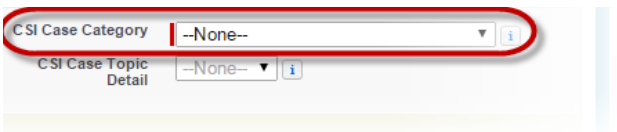


4. Although the **CSI Case Type** field appears to have a drop-down menu, there is only one choice for this field: **Employee Relations**.

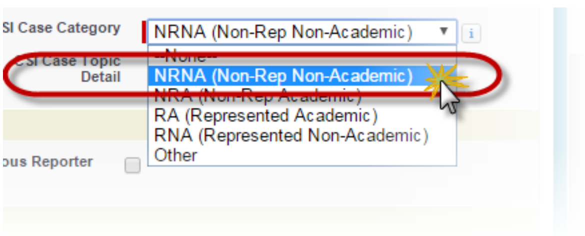


Once a **CSI Case Type** has been selected, the **CSI Case Category** field will enable.

5. Click anywhere in the **CSI Case Category** field to display the drop-down menu and select the appropriate topic category.



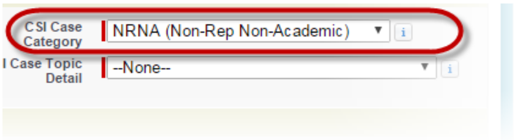
6. When the drop-down menu displays, select the appropriate category.



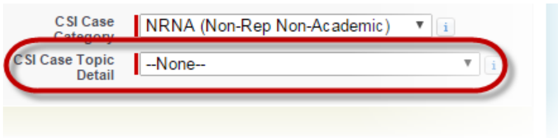
Case Category identifites the general classification of the **Reporter** involved in the issue. In a situation where the **Reporter** wants to remain anonymous or is unknown, use the general classification of the **Primary Reportee**.

NRNA (Non-Represented, Non-Academic)
NRA (Non-Represented, Academic)
RA (Represented, Academic)
RNA (Represented, Non-Academic)
Other (Non-Employee)

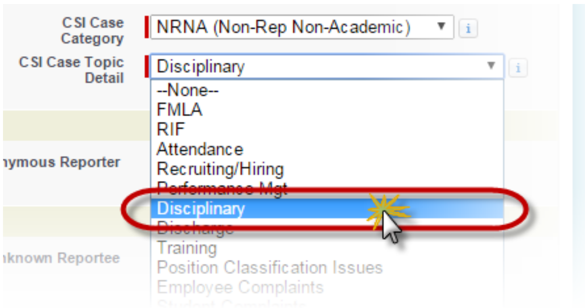
7. Your selection will be entered into the field.



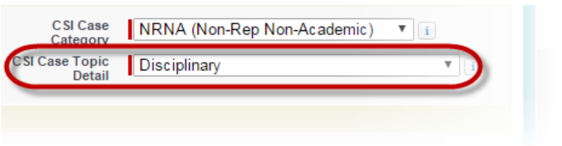
8. Click anywhere in the **CSI Case Topic Detail** field to display the drop-down menu and select the appropriate case topic detail.



9. When the drop-down menu displays, select the appropriate case topic detail.



10. Your selection will be entered into the field.



Reporter Section

There are two fields in this section: **Case Reporter** and **Anonymous Reporter**.

The **Case Reporter** field contains the name of the person who brought the issue to the attention to his/her manager (and ultimately HR). If this person is an WSU employee and his/her contact information has been uploaded into Salesforce, you can use the "look up" function to locate his/her contact information. In this manner, the employees name will be inserted into the **Case Reporter** field.

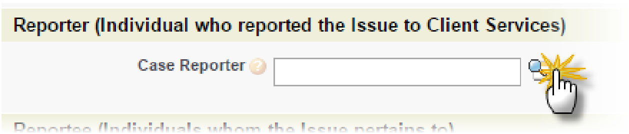
The **Anonymous Reporter** field is a checkbox. If the reporter is unknown or wishes to remain anonymous, you check the check box.

The data contained in Scenario 1 will be used in this example. A summary of the issue follows:

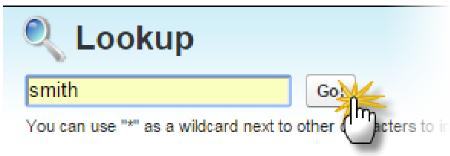
Summary: The incident occured in a University Library. Two employees, Jessica Jones and Caroline Smith, were involved in a physical altercation. Jones pushed Smith to move her out of the way. Smith asked Jones to stop touching her. Jones acknowledges putting her hands on Smith.

To complete this section, follow these steps:

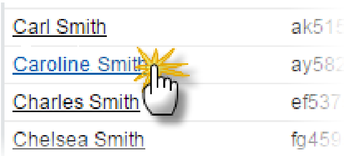
1. Click the **Lookup** button to the right of the **Case Reporter** field. The **Contacts** lookup function will display in a new window.



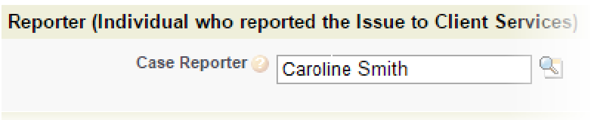
2. When the **Lookup** window displays, enter the employees last name and click **Go**. A list of employees with this last name will display.



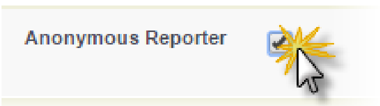
3. From the list, select the employee you want to assign as a reporter and click his/her name.



4. The employee's name will be displayed in the Case Reporter field.

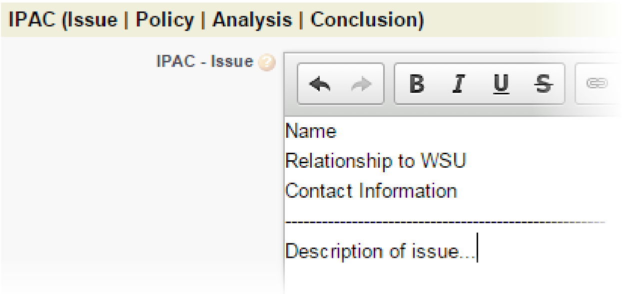


5. If the reporter is unknown or wishes to remain anonymous, check the **Anonymous Reporter** check box.



Note: If the person reporting the issue is not a WSU employee, his/her name will not appear in the Contact list; therefore, you will not be able to enter the name in the **Case Reporter** field and no contact information will be available through the system.

In the event this should happen and the reporter does not wish to remain anonyous, clearly identify the reporter and his/her contact information on the top lines of the IPAC-Issues text area.



Reportee Section

The **Reportee** section contains the name or names of the individuals involved in the issue. If the **Reporter** was involved in the issue his/her name will appear in this section, also.

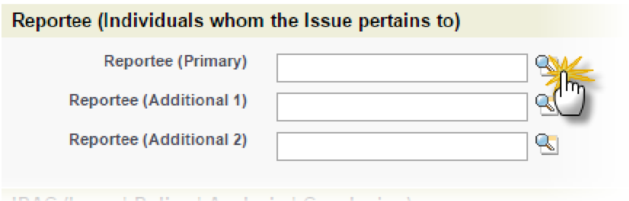
This section contains three fields for listing **Reportees**.

The data contained in [Scenario 1](#) will be used in this example. A summary of the issue follows:

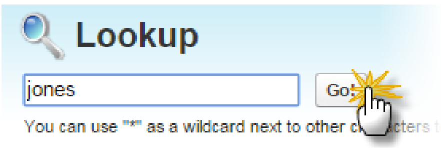
Summary: The incident occured in a University Library. Two employees, Jessica Jones and Caroline Smith, were involved in a physical altercation. Jones pushed Smith to move her out of the way. Smith asked Jones to stop touching her. Jones acknowledges putting her hands on Smith.

To complete this section, follow these steps:

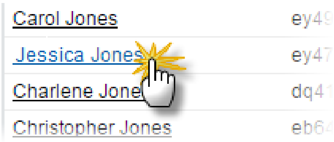
1. Click the **Lookup** button to the right of the **Reportee (Primary)** field. The **Contacts** lookup function will display in a new window.



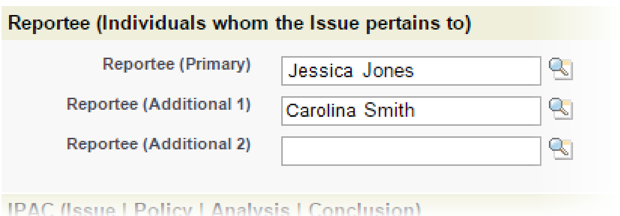
2. When the **Lookup** window displays, enter the employees last name and click **Go**. A list of employees with this last name will display.



3. From the list, select the employee you want to assign as a reportee and click his/her name.



4. The employee's name will be displayed in the **Reportee** field.



   For additional **Reportees**, repeat steps 1 through 4.

5. If the **Reportee** is unknown, check the **Unknown Reportee** check box.

IPAC Section

The **IPAC** (Issue, Policy, Analysis and Conclusion) section contains four text areas. It is in this section you will document the results of your investigation. Although large in appearence, the height of the text area will contract to fit the data entered.

If you have used a CCRM for documenting your investigation, this process can be achieved by copying and pasting the content from your MS Word document.

Dates: The only date the system generates is the date you create the new case. **PLEASE** include all issue related dates in the appropriate **IPAC** area.

Note: When entering text directly into the text areas, the text font will be similar to ariel or helvetica. Each text area has its own abbreviated word processing tool bar for controlling basic text style and layout.

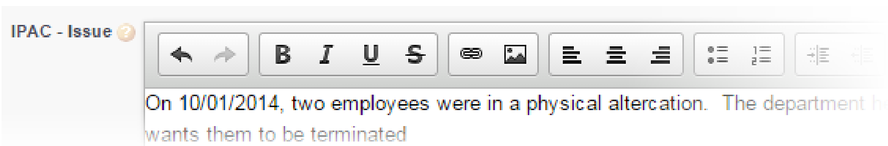
When copying and pasting from another document, basic font and layout styles will be imported with the content. If you want your font to match the font type and size of the Salesforce, set your font to Ariel and font size to 10 pts.

The data contained in [Scenario 1](#) will be used in this example. A summary of the issue follows:

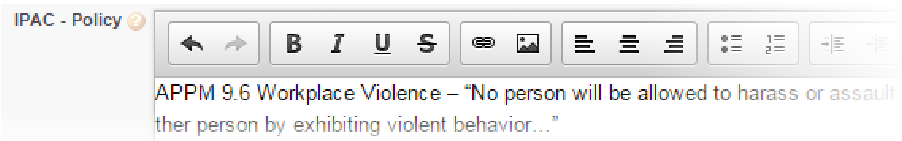
Summary: The incident occured in a University Library. Two employees, Jessica Jones and Caroline Smith, were involved in a physical altercation. Jones pushed Smith to move her out of the way. Smith asked Jones to stop touching her. Jones acknowledges putting her hands on Smith.

---

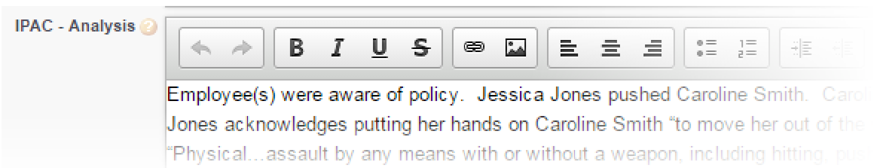
1. Enter (copy/paste) a description of the issue into the **IPAC - Issue** text field.



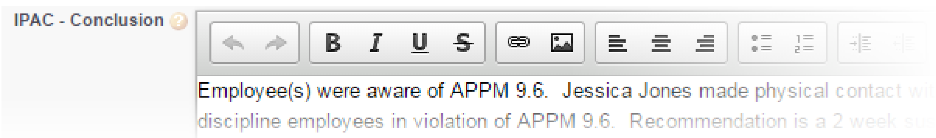
2. Enter (copy/paste) the applicable WSU policy, department guideling, or practice associated with the issue into the **IPAC - Policy** text field.



3. Enter (copy/paste) your analysis of the issue into the **IPAC - Analysis** text field.



4. Enter (copy/paste) your conclusion of the issue into the **IPAC - Conclusion** text field.



Saving or Canceling the New Case

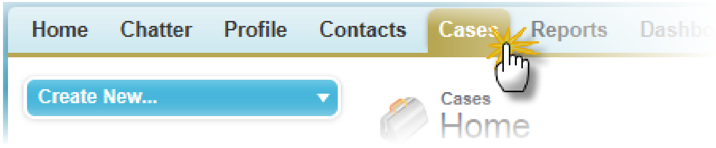
For a new case that has just been created, there are three options for completing the process:

Save	Saves the contents of the new case and the system assigns a case number to it.
Save & New	Saves the contents of the new case, the system assigns a case number to it, and the system opens a new case template.
Cancel	Cancels the creation of a new case, all contents are lost, and the system does not assign a case number to it.

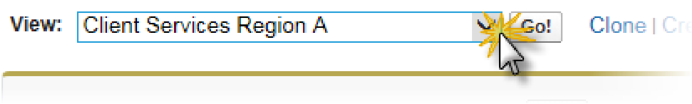
Opening an Existing Case

After logging into Salesforce...

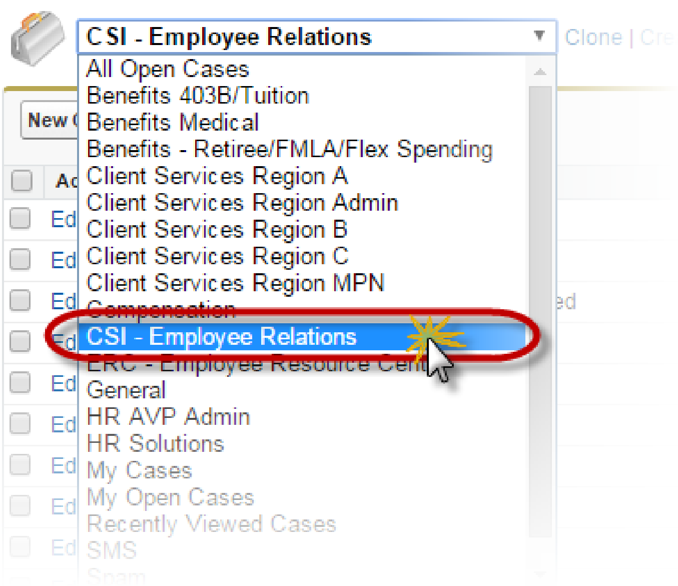
1. Click the **Cases** tab.



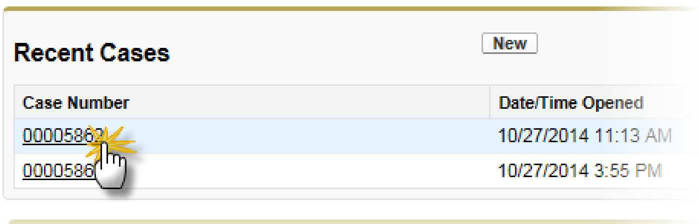
2. When the **Cases** tab displays, click the drop-down menu in the **View** field.



3. From the drop-down menu, select **CSI-Employee Relations**.



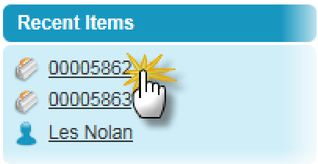
4. Select the case you want to view from the **Recent Cases** section and click the **Case Number**.



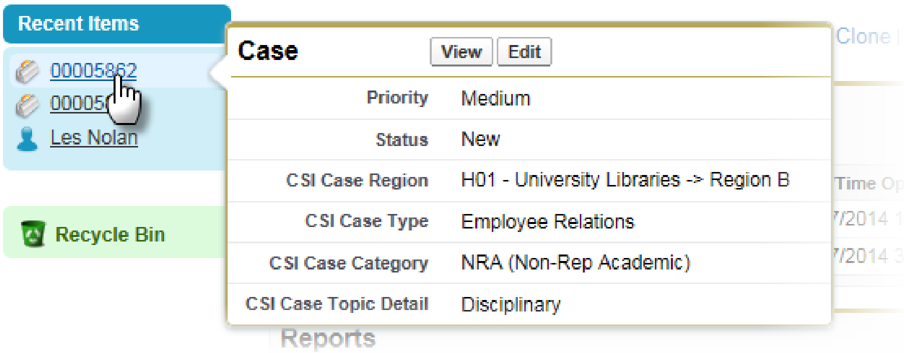
5. The case will open.

Alternative Method

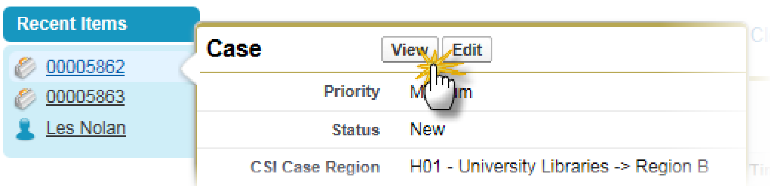
1. If you have created or worked on the case recently, you may find the case number listed the the Recent Items of the navigation panel on the left-side of your screen.



2. If you do not recognize the case by the case number, hover your mouse pointer over each case number until the case summary displays.



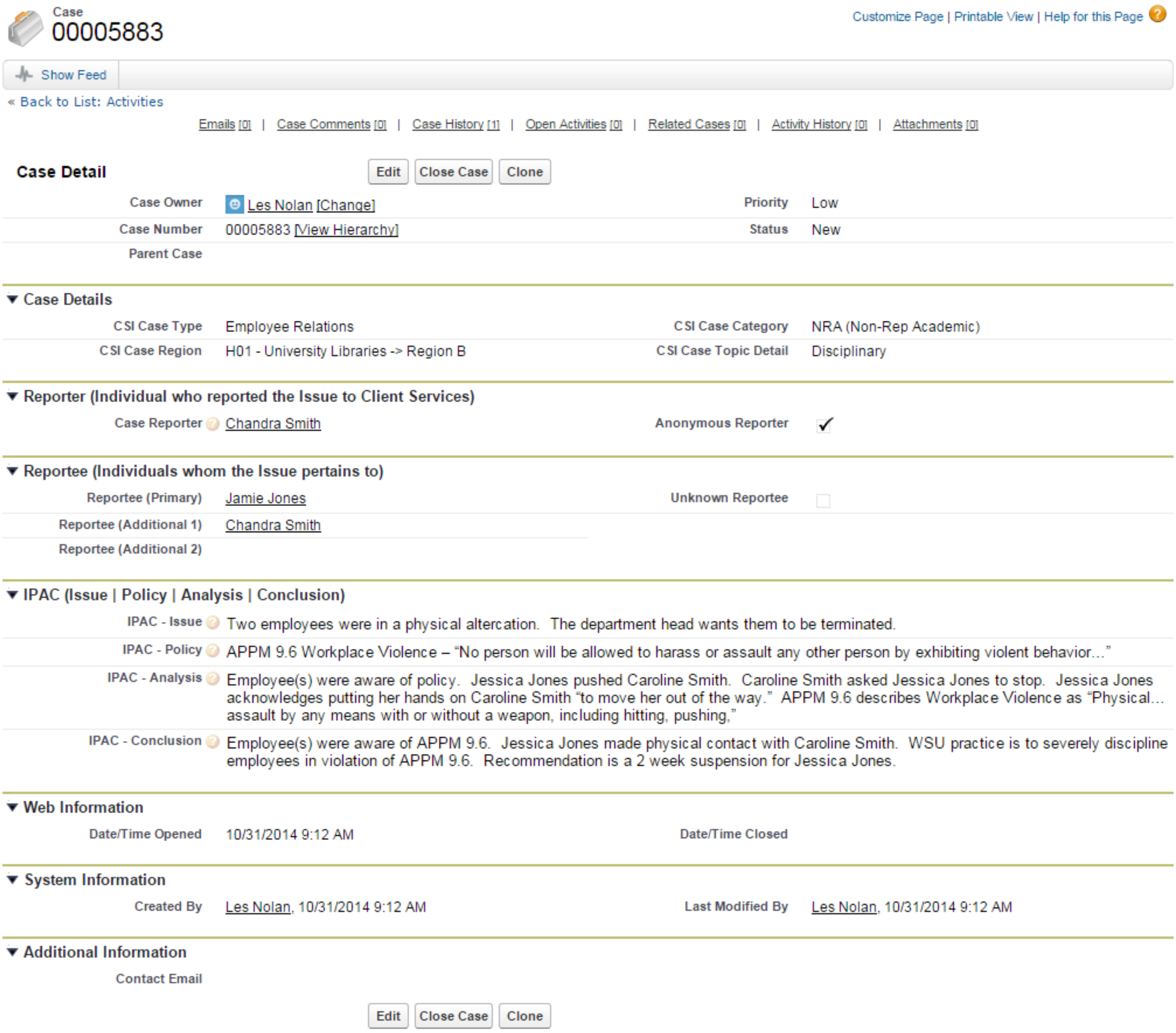
3. Once you have located the case, you can either **View** or **Edit** the case by clicking the appropriate button.



4. The case will open in the mode you selected.

Viewing an Existing Case

Here is example of a new case will appear after it has been opened.


Case
00005883

Customize Page | Printable View | Help for this Page

Show Feed

« Back to List: Activities

Emails [0] | Case Comments [0] | Case History [1] | Open Activities [0] | Related Cases [0] | Activity History [0] | Attachments [0]

Case Detail Edit | Close Case | Clone

Case Owner	Les Nolan [Change]	Priority	Low
Case Number	00005883 [View Hierarchy]	Status	New
Parent Case			

Case Details

CSI Case Type	Employee Relations	CSI Case Category	NRA (Non-Rep Academic)
CSI Case Region	H01 - University Libraries -> Region B	CSI Case Topic Detail	Disciplinary

Reporter (Individual who reported the Issue to Client Services)

Case Reporter	Chandra Smith	Anonymous Reporter	✓

Reportee (Individuals whom the Issue pertains to)

Reportee (Primary)	Jamie Jones	Unknown Reportee	
Reportee (Additional 1)	Chandra Smith		
Reportee (Additional 2)			

IPAC (Issue | Policy | Analysis | Conclusion)

IPAC - Issue	Two employees were in a physical altercation. The department head wants them to be terminated.
IPAC - Policy	APPM 9.6 Workplace Violence – "No person will be allowed to harass or assault any other person by exhibiting violent behavior…"
IPAC - Analysis	Employee(s) were aware of policy. Jessica Jones pushed Caroline Smith. Caroline Smith asked Jessica Jones to stop. Jessica Jones acknowledges putting her hands on Caroline Smith "to move her out of the way." APPM 9.6 describes Workplace Violence as "Physical… assault by any means with or without a weapon, including hitting, pushing,"
IPAC - Conclusion	Employee(s) were aware of APPM 9.6. Jessica Jones made physical contact with Caroline Smith. WSU practice is to severely discipline employees in violation of APPM 9.6. Recommendation is a 2 week suspension for Jessica Jones.

Web Information

Date/Time Opened	10/31/2014 9:12 AM	Date/Time Closed	

System Information

Created By	Les Nolan, 10/31/2014 9:12 AM	Last Modified By	Les Nolan, 10/31/2014 9:12 AM

Additional Information

Contact Email	

Edit | Close Case | Clone

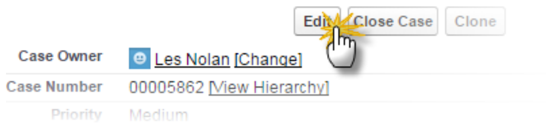
Editing an Existing Case

There are two methods for editing an existing case:

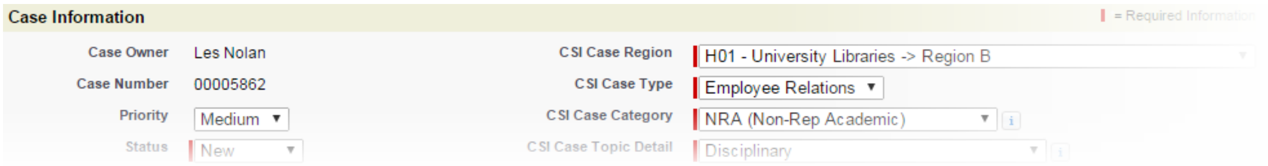
- Open the entire case in the edit mode
- Open individual fields in the edit mode

Opening Entire Case in Edit Mode

1. After logging into **Salesforce** and displaying the appropriate case, click the **Edit** button in the center of the screen just above the **Case Information** section.



2. All editable fields in the case are now available for editing.



Opening Individual Fields in Edit Mode

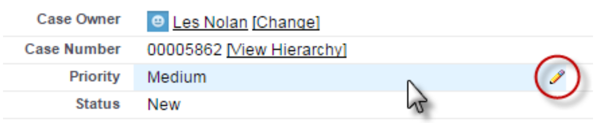
Most, but not all, of the fields in a case are editable. You can tell the difference by hovering your mouse pointer over a field then looking at the icon that appears to the left of that field.

 The closed-lock icon indicates the field is locked and cannot be edited (changed).

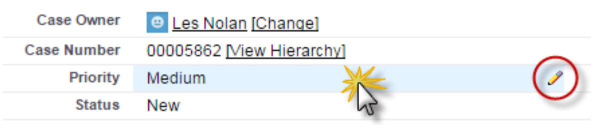
 The pencil icon indicates that the field is editable.

To open an individual field for editing, follow these steps:

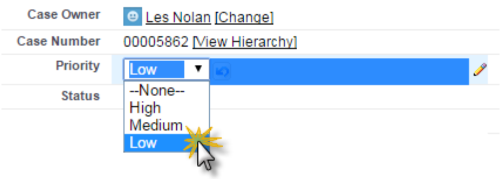
1. Locate the field you want to edit and hover your mouse pointer over it. If the data field can be edited, it will be highlighted in blue and the pencil icon will appear at the right of the field.



2. Double-click anywhere in the blue-highlighted area. The field will switch to the edit mode for that field.



3. Make the appropriate edit.



4. Move your mouse pointer off the field you just changed and click your mouse anywhere else on the screen.

Notice that the font color of the field you just changed has turned to orange and an **Undo** button has appeared to the right of the entry. If you want to return to the original entry any time prior to saving your changes, click the **Undo** button. Once you save your edits, the **Undo** button is hidden.

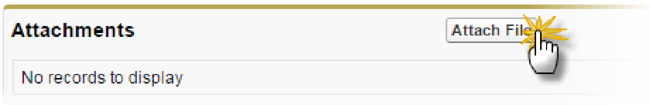
Attaching a Document to a Case

Once a new case has been saved and a case number assigned, you can attach supporting documentation to the case. The steps below instruct you on how to attach documents to a case.

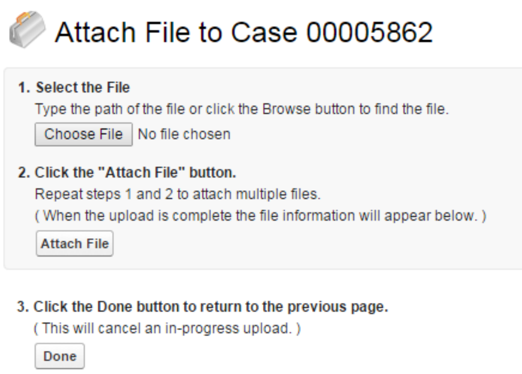
Best Practice:	Before attaching any documents (files) to a case, convert the files to PDF file format. PDFs have a smaller file size (take up less memory), and they make viewing attached documents easy because PDFs wil open in your browser. Other document formats require you to download the file, save it locally, then view it in it's associated application.

After logging into Salesforce and opening the appropriate case:

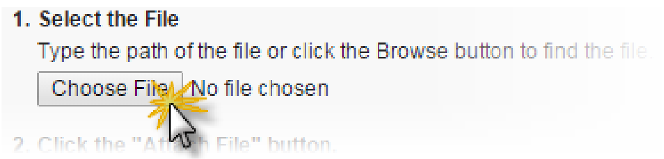
1. Scroll to the bottom of the screen and click the **Attach File** button.



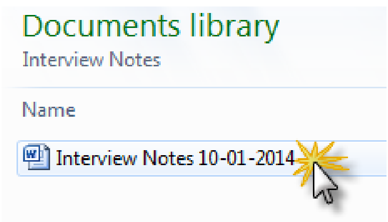
2. Follow the steps that appear on the **Attach File** screen.



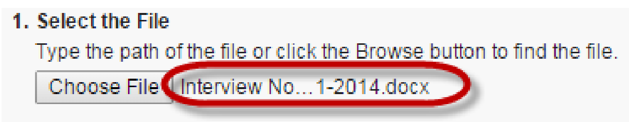
3. Select the file you want to attach by clicking the **Choose File** button. The file



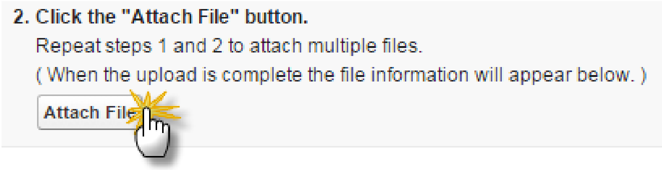
4. When the **Open** file dialog box displays, locate the applicable file and double-click it or select the file and click **Open**.



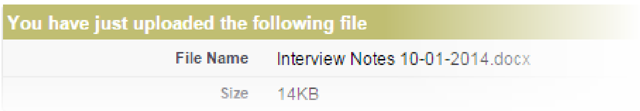
5. The file name will appear to the right of the Choose File button.



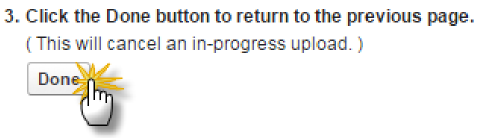
6. Attach the file to the case by clicking the **Attach File** button.



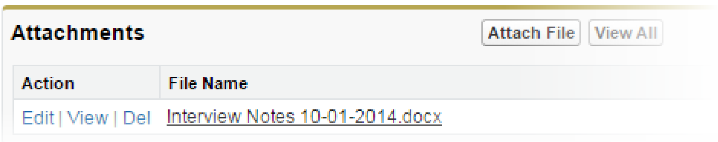
7. Notification of the attach process displays at the bottom of the screen.



8. Click the **Done** button when you are finished attaching files to this case. Salesforce will return to the case view.



9. Scroll to the bottom of the case view. The attached document will be listed in the **Attachments** section.



Viewing an Attached Document

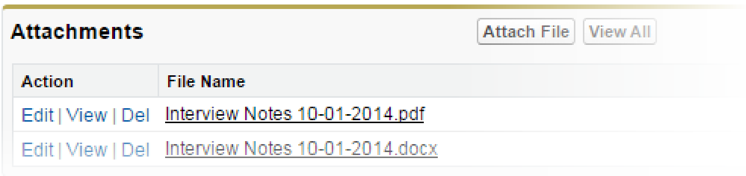
If the document was converted into a PDF format before attaching it to the case, the viewing process is simple: PDF documents open in all browsers as a second tab or new window. If the document was attached as a MS Word file, for an example, then your browser will prompt you to either open the file in Microsoft Word or save it locally, so that it can be opened in Microsoft Word.

Both methods are shown below.

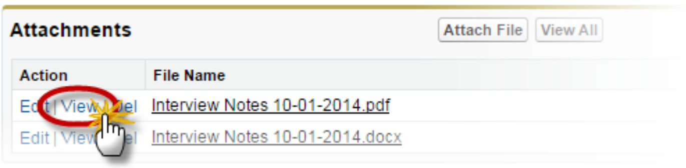
Viewing a PDF File Attachment

After logging into Salesforce and opening the appropriate case:

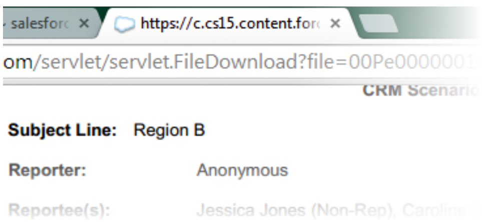
1. Scroll to the bottom of the case screen until the **Attachments** section is visible.



2. In the **Action** column, click **View** for the document you want to display.



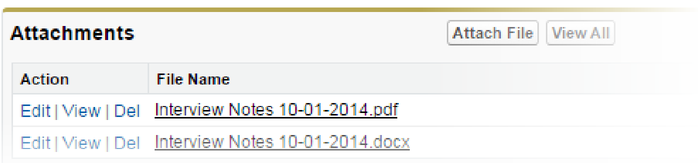
3. Because this is a PDF file, the document opens in another browser tab.



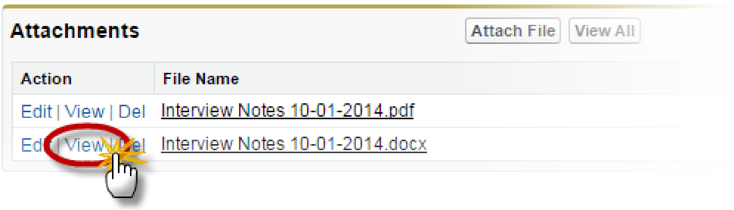
Viewing a Word File Attachment

To demonstrate how complex viewing a Word document in a web browser is, here are the steps for viewing the document using Google's Chrome.

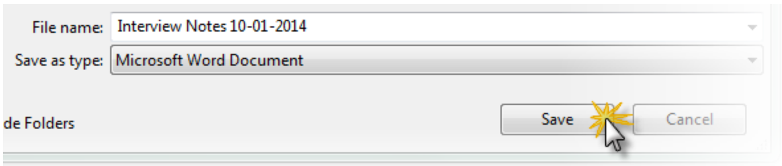
1. Scroll to the bottom of the case screen until the **Attachments** section is visible.



2. In the **Action** column, click **View** for the document you want to display.

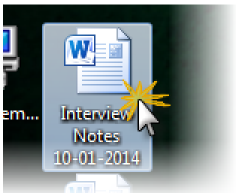


3. Because this is a DOCX file, the browser prompts you to open the file to view it in MS Word, of if you are using Google Chrome, your only option is to save the document locally. Click the **Save** button.

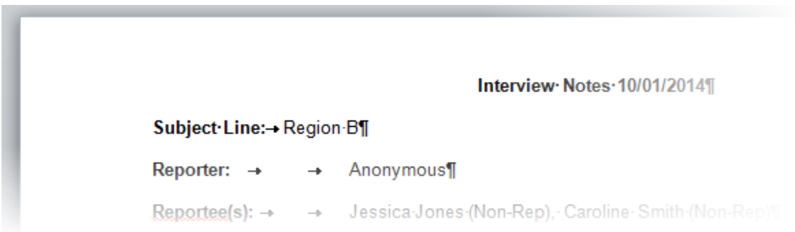


In this instance, the file is being saved to the Desktop.

4. Locate the document on your Desktop and double-click it to open it in MS Word.



5. The document opens in MS Word.

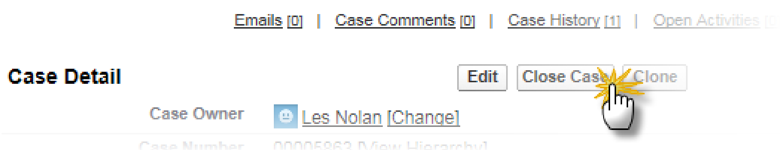


Closing a Solved Case

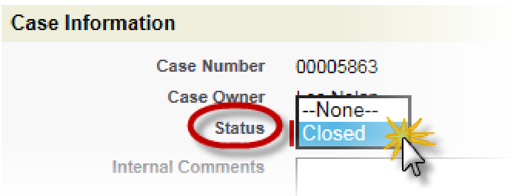
After finishing your investigation and the issue has been resolved, you must close the case to make it inactive.

After logging into Salesforce and opening the appropriate case, perform the following:

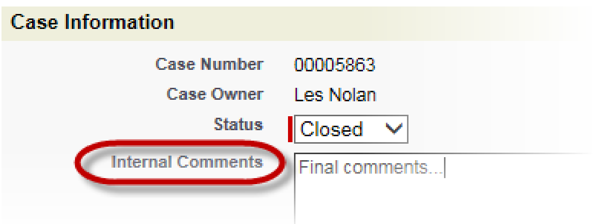
1. Click the Close Case button located in the Case Detail section.



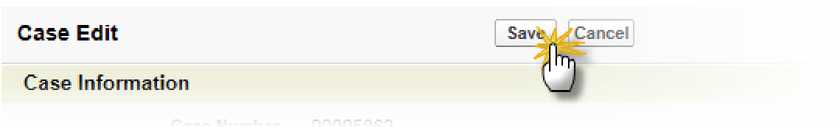
2. When the Close Case screen displays, click any where in the Status field and change the status to Closed.



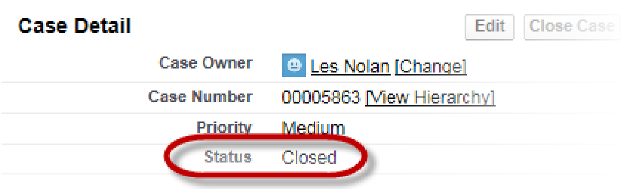
3. If you have any final comments before closing the case, you can enter them in the Internal Comments field.



4. When finished, click the Save button at either the top or bottom of the screen.



5. The case Status is changed to Closed.



Scenarios

The following scenarious will provide hands-on experience at creating new cases.

Scenario 1

Subject: Region B

Reporter: Anonymous

Reportee(s): Jessica Jones (Non-Rep), Caroline Smith (Non-Rep)

IPAC

Issue: Two employees were in a physical altercation. The department head wants them to be terminated.

Policy: APPM 9.6 Workplace Violence – "No person will be allowed to harass or assault any other person by exhibiting violent behavior…"

Analysis: Employee(s) were aware of policy. Jessica Jones pushed Caroline Smith. Caroline Smith asked Jessica Jones to stop. Jessica Jones acknowledges putting her hands on Caroline Smith "to move her out of the way." APPM 9.6 describes Workplace Violence as "Physical…assault by any means with or without a weapon, including hitting, pushing,"

Conclusion: Employee(s) were aware of APPM 9.6. Jessica Jones made physical contact with Caroline Smith. WSU practice is to severely discipline employees in violation of APPM 9.6. Recommendation is a 2 week suspension for Jessica Jones.

Scenario 2

Subject: HRMPN

Reporter: Supervisor John Doe

Reportee(s): Jane Smith, Secretary III, Staff Association

IPAC

Issue: Over the last eight (8) months, Jane Smith has had excessive absenteeism. Specifically, she has had 10 occurrences and 75 occasion hours. Every occasion has been on a Monday and/or Friday. This has been disruptive to the department operations and the supervisor would like discuss this with the employee and take action, if necessary.

Policy: Supplemental Letter of Agreement #26 of the collective bargaining agreement, titled Attendance Expectations, states in pertinent part: “The parties agree that absenteeism and tardiness can significantly disrupt service and shift work unfairly on co-workers. It is reasonable to expect employees to be promptly at their work sites, ready to work at the designated times.

The parties reaffirm the already existing rights under the contract for the Employer to implement and enforce attendance standards. Such attendance standards may include specifying required documentation for absence…”

Article 34.A of the Staff Association contract also communicates:

“…The Employer reserves the right and discretion to establish attendance standards, to institute discipline, and to require verification of absence when deemed appropriate.”

Analysis: Jane Smith was provided a JPED at the beginning of employment which addressed Attendance Expectations. Therefore, she was aware of policy. Jane Smith acknowledges that she has been calling out ill quite often given that she has been tired after a long weekend and agrees to remedy this right away. Jane is also aware of the University Attendance Standards on absenteeism and tardiness, APPM 3.0.11.

Conclusion: Jane is aware of the requirements under APPM 3.0.11. WSU practice is discipline employees in violation of APPM 3.0.11. Recommendation is a written reprimand as well as placing Jane on medical verification.

Scenario 3

Subject: Region A

Reporter: Rachel Moore, Academic Advisor, AAUP

Reportee(s): Jan White, Administrative Assistant II, P&A

IPAC

Issue: Rachel Moore is new to the department and has noticed in the past 60 days that one of her co-workers spends the majority of her time at work, working on her personal travel business. Ms. Moore originally brought this to Jan's supervisor's (Jillian Jordan, ASO IV, AAUP) attention but noticed nothing changed. She then filed a complaint with internal audit.

Policy: Violation of University Policy 00-1 (Acceptable Use of Information technology Resources) Section 3.3

Analysis: Through an investigation conducted by internal audit there was sufficient evidence that Jan White was using equipment for Personal "for profit" business. Also during the investigation it was found that this was reported correctly to the supervisor and that she failed to act upon the reported information. This report was turned over to the Dean of the college, Provost Office, Labor Relations and Human Resources. All parties met to discuss the report findings.

Conclusion: It was determined that Jan White violated the above referenced policy and the offense was considered Gross Misconduct. The recommendation was that Jan White be placed in a last chance agreement as outlined by Labor Relations. A secondary report was completed for Jillian Jordan who did not follow proper procedures.

Scenario 4

Subject: Admin Region

Reporter: Nicole Johnson (Non-Rep)

Reportee(s): Tim Farell (Non-Rep)

IPAC

Issue: Employee and Manager Altercation

Policy: Workplace Violence Policy

Analysis:

- Employee requested a meeting with manager to inquire why he had not been promoted to a manager position. During the meeting, the manager claimed that the employee threatened him with physical violence.
- After 5pm (same day), both parties were involved in a verbal altercation – witnessed by other employees. The employee was restrained from attacking the manager.
- Later in the evening, the manager sent the employee a text message essentially accepting employee's invitation to a physical altercation and went further by threatening the employee.
- HR Consultant investigated issue relative to non-rep manager. Through investigation, discovered that the manager

Conclusion:

- Counseled with AVP and OGC who supported termination of manager for Violation of Workplace Violence policy.
- HR Consultant forwarded issue related to employee to Labor Relations who investigated the issue and terminated the employee for same violation.

Scenario 5

Subject: Region C

Reporter: Bill Smith (Contractor)

Reportee(s): Bob Jones (Non-Rep)

IPAC

Issue: Prof. Bill Smith, Assistant Professor of Military Science (sponsored by College of Engineering), submitted a formal verbal complaint with Kimberly Elms from the Office of the CFO. He was utilizing the university complaint process. The complaint is against Bob Jones and other staff members at the Mort Harris Recreation and Fitness Center. Prof. Smith is a contract employee that is employed by the University of Michigan. His contact on campus is Associate Dean Ellis within the College of Engineering.
The complaint includes the following:

1. Professor Smith is attempting to utilize the Mort Harris Recreation and Fitness Center for the Wayne State University ROTC program
2. Professor Smith believes he has been treated rudely, unprofessionally, and disrespectfully by staff of MHRFC.
3. Professor Smith believes that their behavior is preventing him from performing his duties and completing his responsibilities as a Professor at WSU.
4. Professor Smith has provided multiple email documents from Bob Jones that he believes are unhelpful, contain inappropriate comments, display rude and inflammatory comments, and are inaccurate.
5. Professor Smith believes that the staff of MHRFC is act rudely and unprofessionally toward the ROTC students.
6. Professor Smith is requesting that the behavior stop and that he is provided assistance in securing use of WSU resources for the ROTC program.
7. Initial discussion Wednesday, September 10, 2014 via the phone
8. Follow up meeting in person on Thursday, October 2, 2014

Policy: Working with Linda Galante to identify relevant policies and guidelines infraction.

1. Unprofessional / Rude behavior
2. Assistance with Academic Scheduling

Analysis: Shared information with HR Consultant that supports Administration area. Chelsea Hansen interviewed Bob Jones's supervisor. Supervisor acknowledges that emails contain less than professional comments. He is aware that there have been ongoing issues between Bob Jones and the ROTC relative to use of facilities at the MHRFC.

We are working with College of Engineering to help Prof. Smith work within the Academic registration process to secure space and access to gym facilities.

Does not appear to be an EEO protected class issue investigation. As an active member of the military, may be considered a veteran with the corresponding employment protections associated with veteran/military employment protection laws

As of 10/14, Associate Dean Ellis from the College of Engineering was working with Prof. Smith to established classes (w/o) credit to be affiliated with already scheduled classes/courses. This will hopefully enable the ROTC leadership to access appropriate facilities for physical training.

Conclusion: As a result of a change in a military contract, the company that employs Prof Smith no longer has the ROTC training contract. As a result, Prof Smith may no longer be assigned to WSU. I am following up via email to review his status. I have sent emails and made phone calls. I have not received a response from Prof. Smith. As of 10/31/2014 no response from emails or voice mail. Staff and Management within the Mort Harris facility have been counseled.

Dean Ellis has successfully added classes to the registration schedule and secured gym facilities at the Matthaei Physical Education Center for the ROTC students. Issue resolved.