We’ll get started shortly!
Leveraging Technology to Support Effective Case Management

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Campus Kaizen

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Indianapolis Public Schools
Introduction
IPS Case Management Past Processes
Streamlining Case Management
Case Management Technology Best Practices
Examples of Best Practices Leveraging Guardian
Q&A
Industry leading software solution used nationwide by K-12 and College Campuses

Key features include:
- Digital & Mobile Incident Reporting
- Automatic notifications to each team when incidents are reported
- Secure record keeping for each individual report/case
  - Involved parties
  - Documents
  - Notes
  - Meetings
  - Communications
  - Timeline
- Automatic Outcome report generation
- Ability to share reports with parties via secure portal & track access
- Advanced reporting and metrics
- Integration with SIS and other school systems
Managing Data

Efficient & Effective Case Management

Cloud or Desktop Files
Google Forms and CMS
Guardian
Guardian Case Management System

Working with the Team

Reporting
- Staff Portal
- Case Association
- Auto notifications

Case Management
- Workflow View
- Document Attachment
- Correspondence

Data Collection
- Race & Gender Demographics
- Age & Grade Level
- Building & School Location
Shift to IPS Guardian Intake Form
Use this portal for DCS and Title IX Incident Reporting Forms, Employee Complaints and Employee ADA Requests

DCS Mandatory Reporting - This form is NOT a 911 or Emergency Service contact. You must call DCS.

In case of an emergency or immediate threat, contact IPSPD dispatch at 317-226-4633 or dial 911.

Note: A police report must be filed when incident includes sexual violence, sexual exploitation, nude pictures or videos seen, shown to others, or distributed in any manner of a child, & All non-consensual touching of private areas UNDER CLOTHES requires a police report be filed.

CPS Report for suspected child abuse or neglect, sexual harassment, sexual assault, gender-based discrimination:
Any staff member that suspects, witnesses, or is made aware of possible child abuse or neglect of a student by any IPS employee, parent, or any other adult must report, as soon as reasonably possible, by calling CPS at 1-800-800-5556. Use the clearest, most detailed information known. Do not tell a parent/guardian that you have filled a CPS report.
Then complete this on-line CPS Report form that documents your call.

Note: A CPS report should also be filed for student on student sexual assaults, even if they don’t occur on campus, or for consensual sexual activity of students under 16 years old.

Title IX Report for sexual harassment, sexual assault, gender-based discrimination (including pregnancy, sexual orientation, and gender identity):
Any staff member that suspects, witnesses, or is made aware of possible sexual harassment, sexual groping, sexual assault, gender identity harassment, or dating relationship violence, including stalking, must complete the on-line Title IX Report when reasonably possible. Title IX Office email & phone: titleixcoordinator@myips.org, 317-646-5920 or 463-207-4761
Guardian Case Management System

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Leverage a Workflow & Checklist Process to ensure nothing is missed during case work.

- **Workflow stages** = Major Milestones of a Case
  - A mechanism of organization and management

- **Checklist items** = The detailed tasks that should be done or considered when managing a case
  - Consider leveraging automatic Due Dates
  - Organize in such a way that case managers can easily follow

- **Both Workflows and Checklists should mirror your documented processes and policies**
  - Should be regularly updated as practices or regulations change.
Shift to IPS Guardian Workflow
&
Guardian Demo Workflow
# IPS Title IX Workflow View

![IPS Title IX Workflow View](image-url)

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>0</td>
</tr>
<tr>
<td>In Review</td>
<td>0</td>
</tr>
<tr>
<td>Pending Response from School</td>
<td>0</td>
</tr>
<tr>
<td>Open Investigation</td>
<td>0</td>
</tr>
<tr>
<td>Pregnancy Related Accommodations</td>
<td>0</td>
</tr>
<tr>
<td>Informal Resolution</td>
<td>0</td>
</tr>
<tr>
<td>Determination</td>
<td>0</td>
</tr>
<tr>
<td>In Appeal</td>
<td>0</td>
</tr>
<tr>
<td>Closed</td>
<td>0</td>
</tr>
</tbody>
</table>
Example Workflows – Title IX

Title IX, Title IX Adult-on-Student

Pending
Initial Contact
Interim Measures in Place
Investigation
Evaluation of Evidence
Outcome Delivery
Closed

Update Workflow

Office of Civil Rights, Student Title IX Sexual Harassment

Add new stage
Requires Approval?

Pending
Initial Title IX Coordinator Evaluation
Informal Resolution
Notice to Parties
Under Investigation/Interviews
Investigative Report Complete/Sent to Parties
Party Questions and Answers
Decision-maker Findings Report Complete/Sent to Parties
On Appeal
Party Appeal Submissions
Appeals Officer Findings Report Complete / Sent to Parties
Case Closed

Update Workflow
### Example Workflows – Other

#### Office of Civil Rights, Student Discrimination/Harassment/Bullying

<table>
<thead>
<tr>
<th>Stage</th>
<th>Requires Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Initial Fact Gathering</td>
<td></td>
</tr>
<tr>
<td>Inquiry and Analysis Stage</td>
<td></td>
</tr>
<tr>
<td>Investigation Stage - written statements and evidence gathering</td>
<td></td>
</tr>
<tr>
<td>Notification</td>
<td></td>
</tr>
<tr>
<td>Closed</td>
<td></td>
</tr>
</tbody>
</table>

#### Employee Relations, Employee Incident/Complaint

<table>
<thead>
<tr>
<th>Stage</th>
<th>Requires Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Under Investigation</td>
<td></td>
</tr>
<tr>
<td>Findings Reached</td>
<td></td>
</tr>
<tr>
<td>Remedial Action in Process</td>
<td></td>
</tr>
<tr>
<td>Remedial Action Imposed</td>
<td></td>
</tr>
<tr>
<td>Remedial Action Completed</td>
<td></td>
</tr>
<tr>
<td>Response Letters Sent</td>
<td></td>
</tr>
<tr>
<td>SBOE Reporting</td>
<td></td>
</tr>
<tr>
<td>Closed</td>
<td></td>
</tr>
</tbody>
</table>

[Update Workflow](#) [Update Workflow](#)
Shift to Guardian Case View
Guardian Case Management System

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Shift to Guardian Analytics
Guardian is often utilized to intake and manage cases of:

- Title IX
- Behavioral Intervention
- ADA 504
- Bullying
- Employee Relations
- Threat Assessment
- Discipline
- Counseling
Utilized by Districts and Schools Large & Small, including:

- Chicago Public Schools
- Minneapolis Public Schools
- Indianapolis Public Schools
- Metro Nashville Public Schools
- Fort Worth Independent School District
Is endorsed by

ATIXA
Association of Title IX Administrators

NABITA
National Association for Behavioral Intervention and Threat Assessment
For more information:

www.GuardianK12.com

To Schedule a Demonstration or receive pricing information:

Email: jay@campuskaizen.com
Visit: www.campuskaizen.com