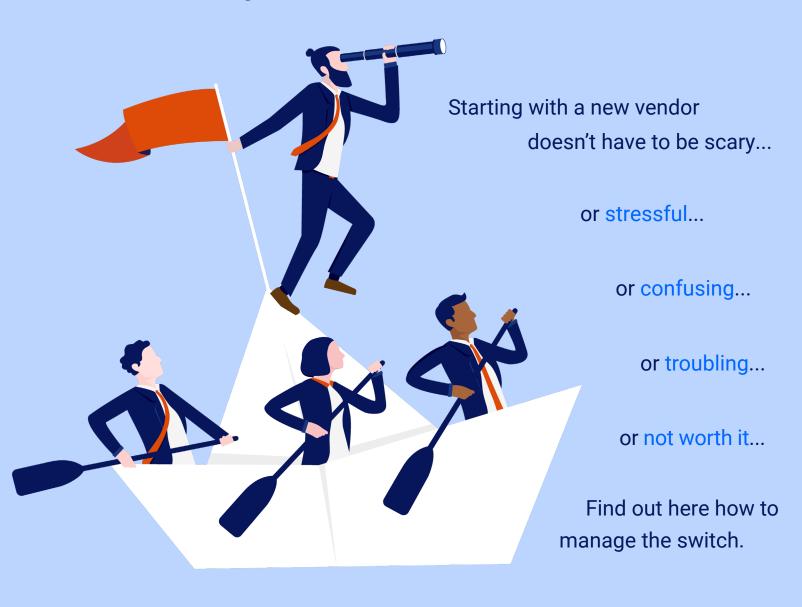
Checklists and steps to make sure the transition to MyCM is all smooth sailing!



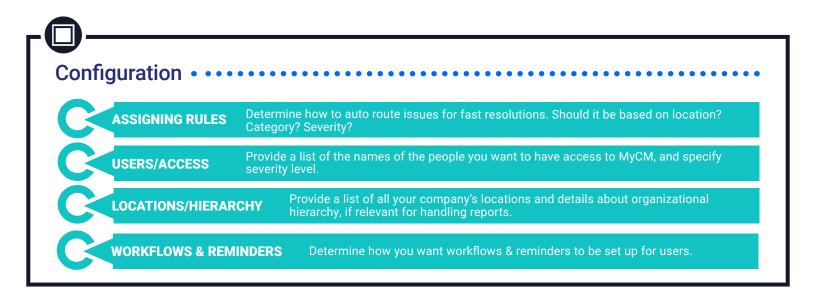


Preparations Checklist Case Management

Starting with a new vendor doesn't have to be scary.

ok Vour Cu	rrent Contract ••••••••••••••••••••••••••••••••••••
ck foul Cu	inent Contract
CANCEL DATE	Determine when you are able to cancel your current contract. Check the fine print for any hidder penality costs or cancellation windows.
SERVICES	What services are defined in your current contract that you want to make sure you replace?
UPGRADES	Perhaps your contract was made while your company was smaller. Have there been changes to warrant upgrading your services? Do you have room for improving your ROI?

<b></b>	
Receiving Your Dat	a • • • • • • • • • • • • • • • • • • •
HISTORICAL DATA	Contact your current vendor and request to be provided with all your historical data.
OPEN CASES	Load your open cases into MyCM or work with us on a custom transition solution. Open cases should remain open during your vendor transition!
DEMOGRAPHICS	Provide us with any company demographics (categories, employee types, locations) as needed to complete your profile.



Setup Steps Case Management

# Starting with a new vendor doesn't have to be scary.

# **Perform an Audit**

Before leaving your current vendor, review your historical data to ensure you know what you need to acquire and load. Missing information means you need to request it again.

### **Check Data Lists**

For a smooth rollout, check over your data sets before having them placed in MyCM. Make sure locations, hierarchies, user names, etc. are all in the correct data fields.

# Keep in Mind...

The two most important things you need before starting with MyCM:

- Historical information downloads from your past
- A plan for open issues.
  We can help to make sure
  nothing falls through the
  cracks.

case mgmt system.

# **Inform Everyone**

Alert all your teams and vendors about the new case management system. Anyone who has any direct or indirect involvement with the system should be notified. If there are concerns among users, we can provide any user training needed.

# **Create Timeline**

Create a rollout timeline for your team. Plan out the final interactions with your old vendor, set dates for any user training, and be sure everyone knows the date for the MyCM case management rollout.

#### Who to Inform?

- Users: Your internal team members, HR staff, those who carry out the investigation (such as regional or local leaders)
- IT: Inform IT and/or data security teams

#### **Data Lists Needed**

- Locations: Provide a list of all locations and the local hierarchy if this is needed
- Users: Provide names for those you want to have access to MyCM
- Data Formats: XLSX, FTP, API

#### **Directives Needed**

- Severity: Define what you consider a severity report
- Severity Alert: Define how you want us to alert your or your users whenever there is a severity situation

Possible Hiccups Case Management

# Starting with a new vendor doesn't have to be scary.

Though we will do everything we can to make sure nothing trips you up during the MyCM switch, there can be a few hiccups to emerge. But not to worry! This might seem hard at first glance, but we're here to make it easier and successful!

1

#### **Data Transfer Issues**

There is always a chance of problems emerging from transfer of long complex bodies of data. There could be technical issues which cause the loss of historical data or open cases. Make sure you back these up in more than one place and get your fields mapped well by a caring vendor.

2

#### **Doing All The Work Yourself**

You're already a busy professional and you should not feel like switching to MyCM is something you alone should handle. Reach out to IT or your internal team to compile any of the data lists you need. And make sure your vendor is prepared and staffed to give you all the support you need (like us!).

3

#### **Sloppy Configurations**

A vendor more focused on launching the software and getting paid than setting you up for success will keep your team frustrated and moving slowly. Make sure issue routing, user levels, automatic workflows, and reporting set you up for success from Day 1.

4

### Failed Setup/Not Following Through

It's tragic how frequently we hear compliance leaders have been left with a partially implemented solution, or deal with the bait-and-switch of lengthy (and costly!) reconfiguration projects. Make sure you define success and completion and have grounds to demand your vendor delivers.

5

#### Refusal to Tranfer a Phone Number

It's a huge hassle to re-educate your workforce on a new phone number and replace all awareness materials. Gain control/ownership over your phone number account, get clear commitment of vendor cooperation, or make sure your contract allows you to control treatment of your number.

6

#### **Will Not Release Your Data**

Not every compliance vendor geniunely cares about the success of your compliance program. Some will choose to be punitive for leaving them and they may refuse to transfer your historical data or make it into an ordeal to do so.

7

### Need (or could benefit from) Data Integration

Nowadays, data is king. You may need to update employees, locations, etc. frequently and/or copy issues from one system to another (e.g. compliance case management to HRIS). You can do that manually (if you have the time) or set up APIs to keep your data in sync wherever you need it!