



# Case management

Record, manage and track HR cases securely and efficiently



[ciphr.com](http://ciphr.com) | [info@ciphr.com](mailto:info@ciphr.com) | 01628 814242



# Overview

Managing and solving high volumes of complex and sensitive employee relations cases – or even staying on top of common day-to-day HR tasks – requires tools that are more powerful and secure than spreadsheets.

Ciphr's case management functionality helps busy HR teams record, manage and track cases securely and efficiently, helping teams provide a consistent level of service and mitigating the risk of non-compliance.

Defined workflows, automated reminders, and auditable histories of actions and correspondence help organisations resolve cases more swiftly, while management information reporting enables your team to spot trends and make effective strategic interventions.

Configurable case management workflows and reminders to support your organisation's processes

## Key features

- ✓ Manage HR queries and cases in our HR software
- ✓ Configurable tool that mirrors and supports your HR policies and processes – not the other way around
- ✓ Creates a secure, accurate record of each case's history so you have an auditable trail of evidence should a case reach tribunal
- ✓ Define workflows for each of your case types, ensuring that each case follows a consistent process
- ✓ Report on case data and analyse trends
- ✓ Automatically generates a new tracking number for each case
- ✓ Store correspondence records and supporting documents against individual cases
- ✓ Specify default priorities and outcomes in line with your policies
- ✓ Set default case owners and define who can contribute to each type of case, including creating different roles for groups such as workers, managers and HR users
- ✓ Restrict access to different case types based on specific user roles
- ✓ Dashboard view shows cases you've raised, have been assigned to, or that you have been asked to contribute to



## Key features

- ✓ Automatic notifications alert contributors and owners when they have been assigned to a case
- ✓ View each case's historic timeline of actions
- ✓ Assign and view related cases to help you monitor recurrent problems
- ✓ Secure system helps you comply with GDPR requirements

## Benefits for HR teams

- Helps you manage, track and record complex and sensitive employee relations and legal cases
- Can also be used to manage common, repetitive queries from staff, such as around pay dates and holiday allowances, ensuring that questions are answered swiftly and consistently
- Tasks and cases can be allocated to HR users or other employees, which is particularly beneficial for organisations that have a shared service team
- Configurable to suit your processes and policies, not the other way around
- Configure your own case statuses to help guide users through the process for each type of case

## Case management

- Store documents and correspondence against individual cases – everything is kept securely in one place, meaning you no longer waste time looking for and collating information
- Report on data to identify persistent issues, spot potential problems, and take evidence-backed remedial or preventative action
- Link and cross-reference cases for more intelligence into what's happening in your organisation
- Save valuable HR time spent logging cases, searching for information, and chasing responses from stakeholders
- Creates a robust history of your actions and interventions, which can be used as evidence should a case reach employment tribunal
- Searchable history helps you more readily comply with subject access requests (part of GDPR requirements)

### Benefits for line managers

- View and contribute only to cases that are relevant to you
- Available on desktop and tablet, allowing you to view

and contribute to cases whether you are in or out of the office

- Step-by-step processes give you confidence that you're complying with your organisation's HR policies
- Creates a compliance record, which can be used as evidence should a case reach tribunal
- Helps you manage absence cases – such as long-term sickness – more effectively, so your employees can return to work more quickly

### Benefits for workers

- Available on desktop and tablet, allowing you to submit queries whether you are in or out of the office
- Can submit confidential and sensitive cases privately
- Can easily add more information to open cases
- Data is held securely: minimal risk of data breaches compared with insecure spreadsheets, emails and paper forms
- Ensures your employer follows the right steps to resolve your case
- Creates an auditable record of employer's interactions with you

