# RLDatix

HRCase

# A Compact Guide to Employee Relations

# The role of ER Case Management in today's landscape

As job satisfaction evolves and remote work becomes prevalent, the need for robust ER case management emerges, ensuring seamless employee experiences and addressing challenges proactively. In this era of digital ER, mastering effective case management is integral to navigating the complexities of employee well-being, engagement, and remote work. An ER Case Management solution like Assure HR Case plays a pivotal role, enabling employees to handle over 70% of routine transactions independently, reducing HR intervention.

# What is ER (Employee Relations) Case Management?

ER Case Management involves managing Employee Relations (ER) cases through a designated case management system. The responsibility for handling these cases may lie with the HR team or dedicated ER staff. Such cases encompass a wide range of scenarios, including onboarding, leave requests, grievances, performance issues, disciplinaries, absence, and various other circumstances.

The versatility of ER Case Management extends beyond traditional HR functions, making it a pivotal tool for fostering a positive work environment and employee well-being. By systematically managing the complexities inherent in workplace scenarios, organisations can cultivate a culture of transparency, fairness, and effective conflict resolution.

# Streamlining ER Cases: The Assure HRCase Effect

### Reduce Case Duration and Costs
Significantly reduce ER case costs by reducing their length and being able to track all costs associated with each case.

### Increase Your ER Teams Efficency
Have full visibility of cases and dashboards, enabling you to review progress and keep everything on track.

### Maximise Case Compliance
Build case management workflows in line with your ER policy, ensuring procedures are followed correctly every time and within time limits.

### Proactive ER Analysis
Spot trends and patterns with insightful reporting. Increasing the overall visibility of cases, from costs to length, allows you to drive change that will have an impact.

# Empower your processes with Assure HRCase

Streamline your operational phases, enabling the breakdown of procedures into tailored workflows for each case type. Define stages, steps, and timeframes, ensuring every case is handled efficiently and in full compliance. With comprehensive document capture, gain the certainty of a robust audit trail and compelling evidence from your workflows, providing a secure foundation even in tribunal scenarios.
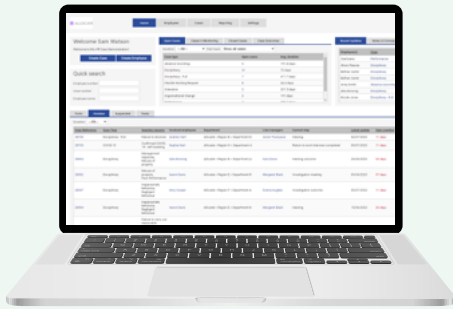


## Features

- **Workflow management:** Configure workflows for each case type, assign stages, steps and timeframes, helping to ensure consistency

- **Microsoft Outlook Add-in (Microsoft Certified):** Ensure security of the product and the Add-in

- **User defined fields:** Create fields that are specific to your requirements

- **Document bundling:** Download all notes and attachments associated with a case in one click

- **Real-time monitoring:** Dashboards and views provide top line visibility and performance monitoring

- **Flexible user permissions:** Control access to each HR case based on user permissions

- **Document capture and central document storage:** Keep all files associated with the case together, and an audit trail providing evidence for each case. Microsoft Outlook Add-In allows you to download correspondence and attachments for a case, straight from your inbox to Assure HRCase with ease, allowing efficiency in managing ER related communications

## Benefits

- Streamline the administrative burden of managing cases

- Cases can be run more effectively and compliantly

- Reduce the risk of having to go to tribunal

- Solve cases quicker, so it's fairer on everyone

- Give more time for your case workers to spend on people, rather than admin

- Increase the efficiency of your case workers and HR team

- Give full visibility of caseloads and progress in minutes

- Task management: List tasks of all sizes in a centralised fashion against a case

- Auto-populated templates: Built-in letter templates populate with mail merge

- Intuitive reporting suite: Powerful custom reporting provides you with the tools to analyse information within Assure HRCase

- Real-time monitoring: Dashboards and views provide top line visibility and performance monitoring

## What our customers have to say about Assure HRCase

"Assure HRCase puts our HR policy front and centre, which is helping the team to meet the standards and timeframes we've set ourselves. All our documentation, correspondence and emails are securely stored in the cloud, in one location, giving us peace of mind that if a case were to go to employment tribunal, we'd have evidence of compliance with our HR policy."

**Alexander Carlton**
Head of People Insight & Technology, Essex County Council

"Assure HRCase helps us to stay on track. It sends alerts and reminders when things are due. Additionally, colleagues can upload documents to the system and set up due dates on each other's cases to help keep everything within time. Work on the cases doesn't have to stop if you're not there."

**Vicky Young**
HR Advisor, Ipswich Borough Council

## Our Collaborative Partnerships