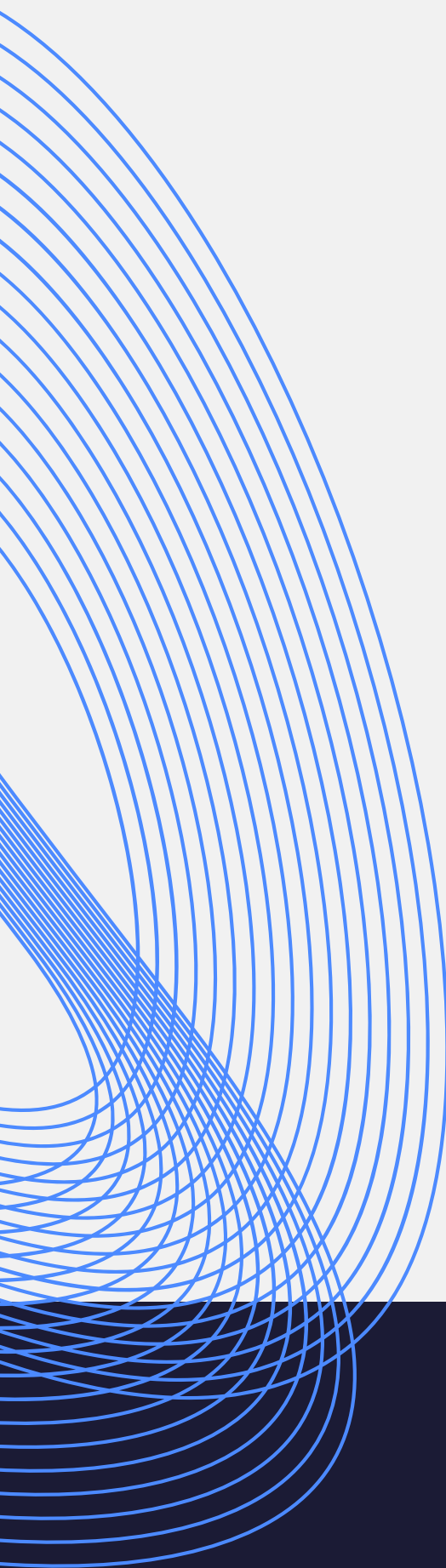




MYOLLA CASE MANAGEMENT (MYOLLA-CM)

Cloud software for secure
casework, stakeholder
records and governance.

Service Overview



SERVICE OVERVIEW

Tailored solutions for public sector casework organisations



Myolla Case Management (Myolla-CM) is a cloud-based case and membership management service designed for UK public sector bodies and organisations that manage sensitive, high-volume casework.

The service brings together member records, case intake, triage, tasking, evidence, communications, reporting and audit into a single secure platform.

Myolla-CM supports organisations managing sensitive operational and legal casework, enabling consistent outcomes, improved visibility and demonstrable governance.

Myolla-CM is delivered as Software-as-a-Service (SaaS) and accessed via a modern web browser.

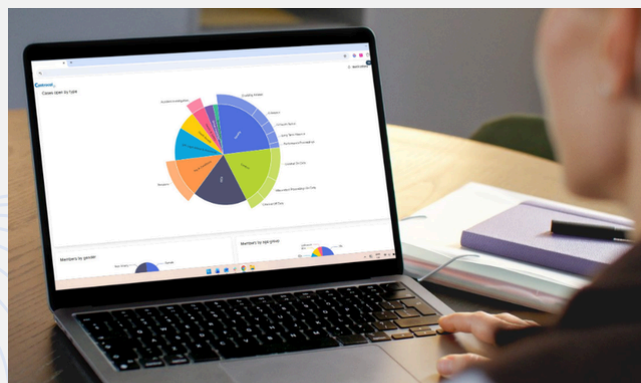
WHO THE SERVICE IS FOR

Myolla-CM is suitable for organisations that manage high volumes of stakeholder interactions and complex casework, including:

- UK public sector bodies delivering regulated casework
- Public Sector and third-sector organisations delivering representation/advocacy
- Professional and regulatory bodies
- Trade unions and federations
- Member-led charities and advice services



Ideal for use in complaints handling and escalations, safeguarding referrals, sensitive investigations, disciplinary and grievance matters, employment disputes, legal representation, health and safety cases, welfare support.



OUTCOMES AND BENEFITS

Improved Client Experience

- Faster and more consistent case intake and triage
- Clear ownership and accountability throughout the case lifecycle
- A single member-centric view across cases, communications and documents

Operational Efficiency

- Standardised workflows and automation
- Reduced duplication and manual handling
- Dashboards and work queues for individuals, teams and managers

Governance and Assurance

- Comprehensive audit trails
- Granular access controls and retention policies
- Structured data capture to support reporting and compliance

Scalable Operating Model

- Proven scalability with growing demand
- Configurable case types for different services
- API-based integration options for wider digital ecosystems

KEY FEATURES

Core Case and Membership Management

- Member and stakeholder records (members, representatives, employers, third parties)
- Structured case capture and triage
- Workflow and task management (assignments, escalations, approvals)
- Case notes and chronological activity history
- Secure document and evidence management with metadata and versioning
- Communication tracking (case-linked email and correspondence)
- Dashboards, alerts and work queues
- Reporting, analytics and data export
- Advanced search and filtering

Legal Case Management

Myolla-CM includes dedicated capabilities for Legal Case Management, distinct from general operational casework:

- Legal case intake via secure forms or staff initiation
- Review and approval workflows prior to legal case activation
- Controlled legal case lifecycle states (e.g. Pending Review, Open, Closed)
- Support for multiple members linked to a single legal case
- Secure handling of legally sensitive notes and documents
- Clear logical separation of legal and non-legal case data with role-based access

Operational Efficiency

- Branch, region and workplace structures
- Case assignments based on role
- Relationship mapping between members, representatives and cases
- Outcome and resolution tracking

Optional capabilities (where contracted) may include member self-service case submission, SMS notifications and third-party integrations.

Configuration and Extensibility

Myolla-CM is configurable to align with organisational processes without requiring customer-specific code changes. Configurable elements typically include:

- Case types, stages, statuses and routing rules
- Customisable fields, forms and workflows
- SLA targets, alerts and escalations
- Roles, permissions and access boundaries
- Templates for communications and documents
- Dashboards and reports

Integration is supported via secure APIs and standard data export formats (e.g. CSV). Integration scope is agreed during onboarding.

Security, Privacy and Information Assurance



Data Protection

- Designed to align with UK GDPR and Data Protection Act 2018 principles
- Data minimisation and purpose limitation
- Full audit logging of access and changes

Access Security

- Secure authentication, including Single Sign-On where required
- Role-based access control with fine-grained permissions
- Secure session management and inactivity timeouts

Hosting and Data Residency

- Provisioned in UK cloud regions where required
- Encryption of data in transit and at rest (subject to hosting model)
- Security assurance evidence provided in line with the selected operating model

Data Retention and Audit

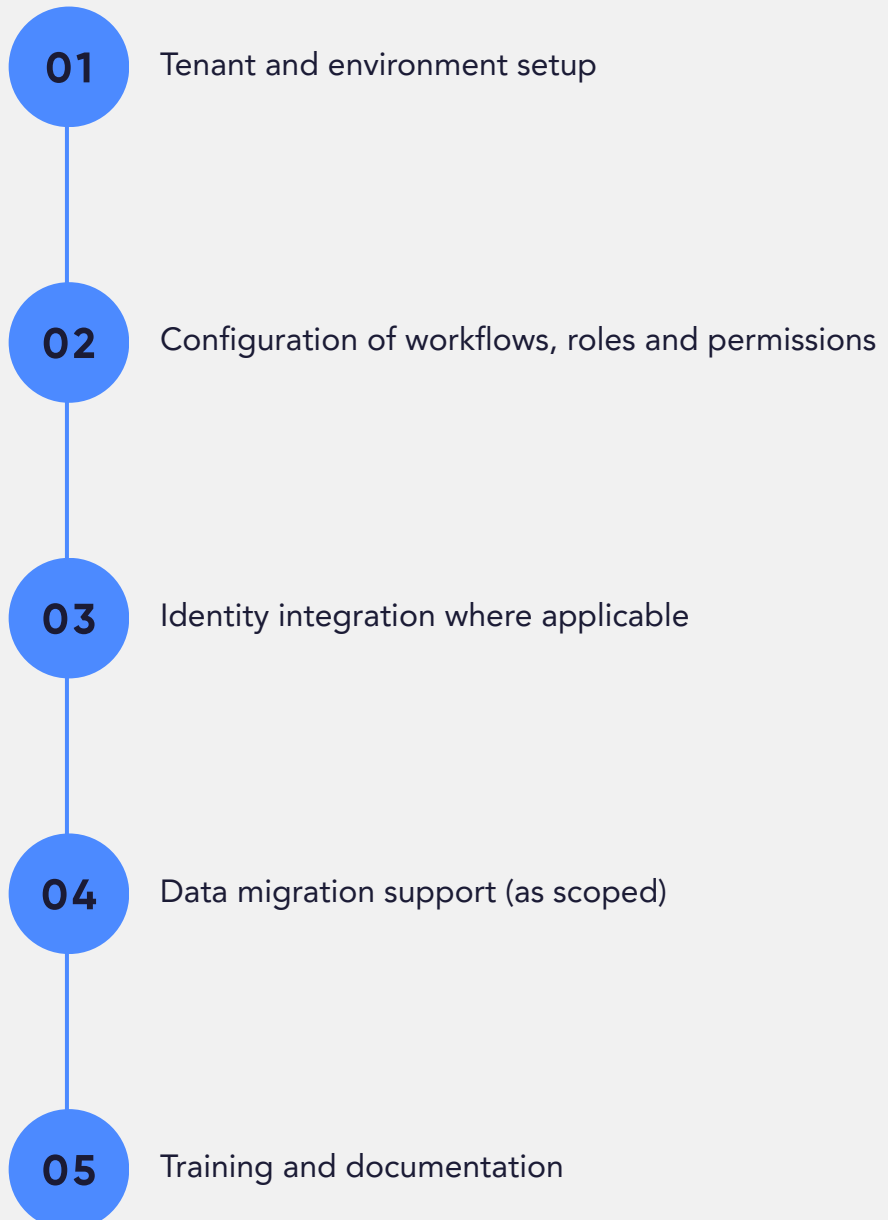
- Configurable retention periods by case type and status
- Case closure and archival rules
- Audit trails for user and administrative actions
- Export support for subject access and operational requests

Backup, Restore and Disaster Recovery

- Automated backups
- Point-in-time restore capability (subject to hosting model)
- Disaster recovery processes aligned to customer requirements

Backup frequency, retention and recovery objectives are agreed and documented during onboarding.

ON-BOARDING



OFF-BOARDING

01

Data export in agreed standard formats

02

Agreed exit plan and timeline

03

Confirmation-led deletion of customer data in line with policy and contract

Service Management and Support

- Structured service management processes
- Named customer contact or account management function (where contracted)
- Support via ticketing and email (telephone support where contracted)
- Incident, problem and change management
- Planned release and change notifications

Service Availability and Constraints

- Available via a modern web browser
- Planned maintenance scheduled in agreed windows
- Some features may depend on third-party services and associated terms



SERVICE LEVELS

Indicative service level targets are agreed contractually. A standard model includes:

Severity	Definition	Target Response	Target Resolution
1	Critical service unavailable	30 minutes	4 hours
2	Major functionality impaired	1 hour	1 business day
3	Minor issue with workaround	4 hours	3 business days
4	Service request/how-to	1 business day	As agreed

Commercial Model

Myolla-CM is typically licensed on a per-user, per-year basis. An alternative per-member licensing model is available for larger member-based organisations. Optional services such as onboarding support, integrations and enhanced support tiers are priced separately.

Service Evolution

The service follows a managed release process with backwards-compatible enhancements and advance communication of planned changes.

GET IN TOUCH

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