



Smart. Secure. Streamlined.

In today's fast-paced world, chasing paperwork, tracking actions, and managing reminders manually just won't cut it. **ionMy Workflow** transforms the way your organisation operates by automating routine processes, enhancing visibility, and making sure nothing slips through the cracks.

Whether it's an incident report, a risk alert, or a committee sign-off – ionMy keeps your team on track and your compliance tight.

Smarter, Automated Workflows

- **No More Paper Trails**

Ditch the delays and hidden costs of paper-based processes. With ionMy, everything is stored in one secure, digital space – accessible anytime, anywhere.

- **Trigger-Based Automation**

Set rules that instantly route forms, generate alerts, assign actions, or escalate issues – all without human follow-up. It just works.

- **Real-Time Oversight**

Stay on top of what matters. From submission to sign-off, everything is traceable, auditable, and reportable.



What ionMy Workflow Can Automate for You

Actions & Task Management

- Automatically assign tasks to the right people
- Track responses, follow-ups, and deadlines
- Escalate when service levels aren't met
- Auto-close completed tasks

Alerts & Reminders

- Event-based alerts (e.g., incident submitted)
- Time-based reminders (e.g., follow-up due)
- Sent to email, SMS, or calendar
- Fully customisable messaging and delivery schedules

Dynamic Forms & Records

- Fully tailored to your terminology and processes
- Trigger-based routing and alerting
- Flexible field and menu customisation
- Build once, automate forever

Integrated Record Linking

- Auto-link related events (e.g. an incident and the hazard that caused it)
- Auto-generate follow-up records like risk assessments or improvement plans
- Escalate to committee agendas with a click
- Built-in hyperlinks and audit trails for traceability

Multi-Layered Sign-Offs

- Role-based approvals with visibility into who's signed off, and who hasn't
- Options for partial or full record closure
- Reduces delays and adds accountability

Scheduled Reports

- Deliver key reports on your timeline – weekly, monthly, quarterly
- Send to the right people, automatically
- Real-time snapshots that support fast, informed decisions

Secure & Role-Based

- Set who can view, edit, approve, or close workflows
- Use your organisational structure to drive process governance
- Ensure compliance, audit trails, and peace of mind

The ionMy Workflow Advantage

- Easy to use – no coding or technical skills required
- Proven, reliable automation for the care sector
- Works across the entire ionMy suite
- Keeps your team aligned, accountable, and informed

**ionMy Workflow – Know what to do, do what you say,
and keep every action moving.**

Want to see it in action? Let us show you how.

