

WorkInConfidence HR Case Management

The Features, Benefits and Security

A publication by



Work In
Confidence



Managing Cases is Only The Beginning - Managing Insight is Where Real Value Lies



Every organisation manages employee relations cases. Grievances, disciplinarys, absence management, capability issues, Speak Up concerns, and even the submission of ideas all require careful handling.

Each case involves people, sensitive information and decisions that can have a lasting impact on individuals and the organisation. Handled well, these cases build confidence, strengthen organisational culture, and help leaders understand what's really happening across the business.

Handled poorly, they can lead to delays, inconsistent outcomes, information governance risks, and a loss of employee trust.

The challenge for many organisations isn't a lack of commitment. It's that information is often spread across multiple systems, emails, spreadsheets and documents, making it difficult to manage cases consistently or see the bigger picture.

Effective HR Case Management brings everything together in one secure place, helping organisations respond promptly, protect sensitive information and turn individual cases into meaningful organisational insight.

Every case deserves to be handled professionally. Every case also has something to teach us.

Four Principles of Effective HR Case Management



Respond Promptly and Professionally

For many employees, raising a concern can take courage. They've often spent considerable time deciding whether to come forward. So, how an organisation responds really matters.

Acknowledging concerns promptly, managing them consistently and communicating clearly throughout the process demonstrates that every concern is taken seriously.

Professional case management builds confidence. When concerns disappear into email inboxes or spreadsheets, confidence quickly disappears with them.



Protect Sensitive Information

HR case files often contain some of the most confidential information an organisation holds. Storing this information across disconnected systems, unprotected spreadsheets, shared drives or personal folders increases the risk of inconsistent access, incomplete records and unnecessary data protection concerns.

Additionally, people who should not have access may be able to view sensitive information, whereas others who need to view it, are unable to.

A dedicated case management platform helps organisations maintain confidentiality through secure storage, role-based permissions and complete audit trails, supporting both GDPR compliance and good information governance.



Turning Cases Into Organisational Insight

Each case tells part of the story. A grievance may highlight concerns within one team. A Speak Up report may identify a wider organisational issue.

Several seemingly unrelated cases across different departments may reveal a pattern that would otherwise remain hidden. When viewed collectively, those cases can reveal patterns, highlight emerging risks and provide powerful insight into organisational culture.

When information is brought together, organisations can quickly identify themes, support managers more effectively, and take action before issues become more significant.



Creating One Trusted Source of Information

Large organisations often receive employee concerns and feedback through multiple routes and across multiple locations. Without a central system, information becomes fragmented and valuable insight is easily lost.

Bringing all employee relations cases together in one secure platform creates a single source of truth, enabling HR teams and leaders to understand what's happening across the organisation while ensuring confidential information remains protected.

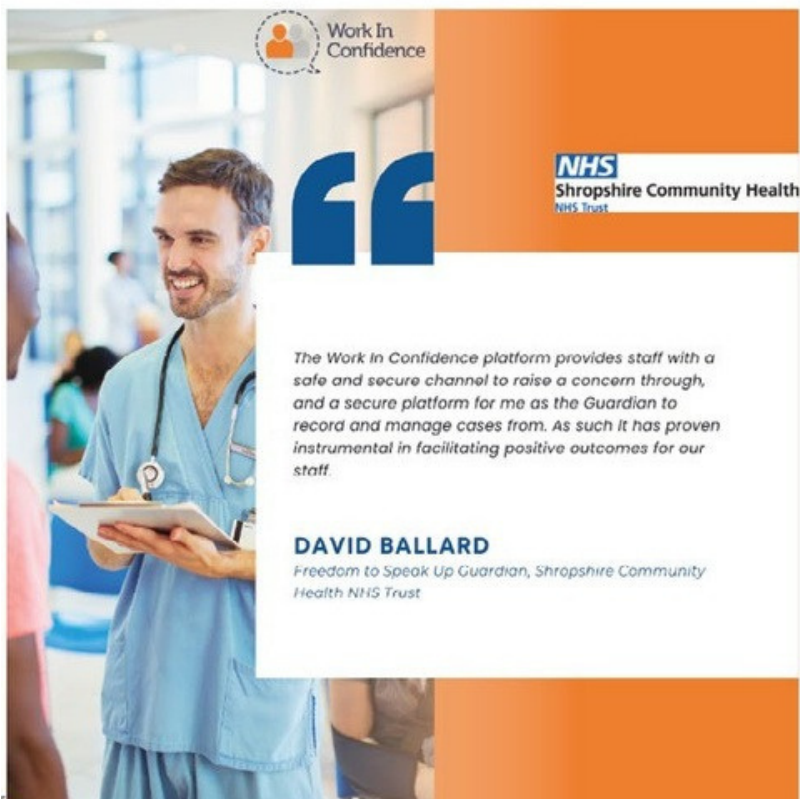
WorkInConfidence HR Case Management

Our HR Case Management software provides one secure, easy-to-use place to collect, track, and report on all HR, grievance, Speak Up or whistleblowing cases. These may have been raised directly with you, by phone, by e-mail or via any other channels you have available - openly or anonymously.

Effective HR Case Management is far more than just having somewhere to record cases. It needs to support consistent case handling, the protection of confidential information, and the

ability to check the progress of every case across the organisation. It provides organisational insight and gives HR teams the confidence that nothing is overlooked.

WorkInConfidence HR Case Management has been designed with these principles in mind. Its features work together to help organisations manage cases professionally, securely and consistently while providing the visibility needed to identify trends, support managers and continually improve.



Work In Confidence

NHS Shropshire Community Health NHS Trust

The Work In Confidence platform provides staff with a safe and secure channel to raise a concern through, and a secure platform for me as the Guardian to record and manage cases from. As such it has proven instrumental in facilitating positive outcomes for our staff.

DAVID BALLARD
Freedom to Speak Up Guardian, Shropshire Community Health NHS Trust

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Move beyond
spreadsheets and
disconnected
systems

How WorkInConfidence Supports Effective HR Case Management



Respond Professionally **Centralised Case Management**

Track HR and Speak Up cases from initial report through to resolution in one secure place.

Intuitive to Use

Simple workflows, flexible sharing and intuitive case management encourage timely, consistent handling.



Protect Sensitive Information

Encrypted Storage

Securely store sensitive employee information with role-based permissions and complete audit trails.

Flexible & Customisable

Tailor fields, workflows and permissions to reflect your organisation's processes and governance requirements.



Gain Organisational Insight **ClearReporting & Trend Analysis**

Monitor progress, identify trends and analyse themes across departments and reporting routes.



Create One Trusted Source of Information **Connected, Centralised Case Management**

Bring HR, Speak Up and other employee cases together in one secure platform, creating a single source of truth for your organisation.

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Accessible

WorkInConfidence HR Case Management is a web-based application that can be accessed anywhere, any time and on any device (all smartphones, tablets and laptops are supported providing that they have a browser and internet connection). You do not need to be in your organisation's offices to continue to be productive.

For example, you might wish to take a picture to associate with a case or scan a document on your phone to attach. With WorkInConfidence Case Management you can do this at the time without having to wait until you are back at the office.

This also means that you always have your cases, their notes and any associated documents with you. This means that if you have an impromptu meeting regarding a case you have the necessary information to hand.

Key Benefits:

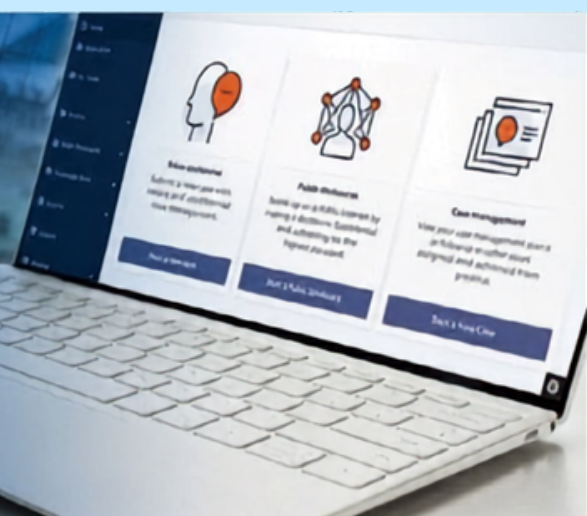
Web-based
application Accessible
from any device -
anywhere

Secure, encrypted
data

Upload documents
functionality
Real-time message
alerts

Introducing our Case Management system

- Multilanguage options
- Mobile enabled
- Accessible
- Full reporting
- Transfer of cases
- Case archiving
- and more...



Easier and Better Reporting

A standout feature of our HR Case Management software is the ability it gives you to record and track cases efficiently. This ensures that no case falls through the cracks and allows HR professionals to maintain a detailed history of each case.

Reporting for compliance, to the Board etc. is easy within WorkInConfidence HR Case Management. The built-in dashboard gives you an instant overview of the number of open cases you have, where they have come from and who is working on them.

The system also has pre-built reports that quickly allow you to get answers to questions such as how many “email cases were raised last quarter”. You can also filter reports using the fields you have created allowing for reports on the number of cases by protected characteristic for example, if you have recorded this.

Key Benefits:

Securely share cases

Group sharing

Restrict access permissions

Easily remove access/sharing. Create customisable reports by type, e.g by stage, case manager, category.



Notifications and reminders

Every Case Manager that is associated with a case can add their own reminders and receive notifications of actions needed. You can automatically add these reminders to your calendar (Microsoft Outlook, Google and Apple are all supported) as well as receiving an email reminder from the system itself.

See all your reminders in one place and manage them with direct links to the case that is associated with the reminder. Again this is not possible with other more traditional methods of recording cases.

Key Benefits:

Add reminders

Receive
notifications

See all reminders in one place. Direct links to associated cases. Add to calendars, Outlook, Google & Apple



Flexible & Customisable - Designed to Save You Time

No two organisations are the same and so WorkInConfidence Case Management allows a number of ways that you can tailor the system to your needs. It also includes a number of time saving features to make case handling quick and efficient.

These include features such as templates for notes. The system comes pre-populated with templates based on the National Guardian's Office (NHS) best practices for recording information but you can create your own.

HR Case Management also includes the ability to record the value of the case attributing a monetary value and a reason to each case. This allows you to report on how effective your case management has been and the value it has been to your organisation.

Effective communication is crucial when addressing sensitive issues like performance management, grievances, bullying and harassment. Our HR Case Management software facilitates easy storage, tracking, updating and sharing among HR personnel and relevant stakeholders, ensuring everyone is on the same page.

Key Benefits:

Pre-built or
customisable templates

Create your own
templates. Record a
value against each case
to measure efficiency

All cases in one
place

Unlimited number of
fields e.g. for
recording protected
characteristics

Multiple contact details

Instant updates

Highly secure - no
sharing sensitive data
via email

Secure

WorkInConfidence HR Case Management is safe and secure with all records encrypted using strong methods and is approved by information governance teams across multiple sectors including health, finance, legal and retail. We have security levels at least as high or greater than those highlighted in the National Data Guardian's review of data security, consent and opt-outs.

We are IASME, Cyber Essentials and Cyber Essentials Plus certified, and have completed the NHS DSPT (Data Security and Protection Toolkit) audited version.

Our services are hosted in the UK and can be accessed securely via phone, tablet or PC through any modern web browser.

Case managers and members of staff will want to know that their data is being stored securely. Paper records and Microsoft Office (Word and Excel) documents are inherently insecure and could be viewed by anyone. The same can be said for transfer of documents via email.

Unlike records held in Office documents you cannot delete a case or modify existing notes after the fact in WorkInConfidence. This means that there is always an accurate historic record of the activity that has taken place on a case.

Key Benefits:

Secure, safe storage

Encrypted data

Highest security levels

You cannot delete or modify existing notes

Always an accurate historic record



Collaboration and Secure Sharing

Sometimes it is necessary to share a case with someone else. Traditionally this would have meant sending the relevant files over email or perhaps photocopying the documents to send. Both of which are potentially insecure.

With WorkInConfidence HR Case Management, by adjusting your Sharing Settings you can choose who to securely share a case with quickly within the case itself.

You can add multiple individuals or whole groups (such as a department) if you wish. You can also choose whether the people you share a case with can see any contact details you hold for this case. You can remove people instantly - not something you can do if you have sent the case by email.

Key Benefits:

Securely share cases

Group sharing

Restrict access permissions

Easily remove access/sharing



Audit Trail

WorkInConfidence keeps an audit trail of actions that are carried out on the system including when a case was created, edited and viewed.

This means you have full traceability of who accessed a case and when, and ensures that you meet any compliance regulations. This is not possible with paper based records or Office documents.

(NOTE: This information is only available on request via WorkInConfidence support and not within in the app itself.

Not Locked In

If your organisation ceases to be a client of WorkInConfidence your data can be exported both as PDF files, (one for each case), and as a CSV file along with all the associated documents. This is available on request.

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About Us

At WorkInConfidence, our mission is to empower organisations to build healthier, safer, more engaged and productive workplaces. Our platform gives every employee a voice within an environment of psychological safety.

 Employee Voice	 Psychological Safety	 Leadership Insights
Creating trusted channels for authentic communication	Building environments where everyone feels safe to speak up	Providing actionable data for informed decision making leading to improved culture and organisational performance.

WorkInConfidence is used across over 100 organisations (c. 200k staff) in the private, public and not for profit sectors. We have a decade of experience delivering a highly secure, easy to use system. WorkInConfidence is registered with the ICO for data protection purposes and is IASME and Cyber Essentials Plus certified.

One Comprehensive Solution Via One Unified Online Platform

 Anonymous Two-Way Speak Up	 Open Case Logging	 Case Management
Removing fear and worry for the nervous or reticent to Speak Up about bullying and harassment, DEI, wellness or ideation.	People who are comfortable with being identified can log cases openly.	All cases (whether received via the platform or directly) can be easily stored, shared, and tracked.
 Clear Central Reporting & Actionable Insights	 Employee Forums	 Surveys
Spot patterns, emerging risks, and identify opportunities for improvement. Provide clear reporting to the Senior Leadership Team, regulators, or the Board.	Enable open discussions to learn and improve.	Gather feedback through pulse, mini or long surveys. Discover and learn from employee viewpoints.

Corporate & Contacts

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Corporate: WorkInConfidence Limited is a Company registered in England and Wales with registered number 08255296 and UK Data Protection registration Z3403582.

