



WorkInConfidence: Speak Up and HR Case Management: GCloud Service Definition

1. Introduction

1.1 Background

WorkInConfidence is an online platform (web app) to deliver better organisational health by enabling staff feedback and handling of Speak Up and HR cases in a trusted and candid way, whilst delivering actionable management insights.

1.2 What We Cover

The WorkInConfidence Platform covers:

- **Case Management:** Easy, safe storage and tracking of Speak Up & HR cases.
- **Anonymous Speak Up:** 2 way Anonymous Conversation to empower Speaking Up.
- **Case Logging:** To give staff who are happy to be identified an easy way to log cases.
- **Surveys:** To understand your people better.
- **Forums:** To foster discussion and sharing of ideas.
- **Central Reporting:** Giving you a clear oversight across the platform.

WorkInConfidence is fully mobile optimised and accessible on desktop, mobile and tablet.

This document covers HR & Speak Up Case Management.

WorkInConfidence: HR Case Management

2.1 Background

WorkInConfidence online Case Management provides a secure, easy online platform to store, track, update and report on HR and Speak Up cases.

The system is cloud based and can be accessed by web browser on PC, Tablet or Phone.

2.2 Handling Cases

Create New Cases

Within WorkInConfidence it is easy to create new cases and record necessary data:

- Store details such as
 - Case Raiser and their details.
 - Category.
 - Source.
- Default fields included - but your organisation can add its own.
- Once created you can add additional notes at any time and update or close the case.

Add Notes and Files To Cases

- Update case notes progress.
- Capture and store relevant information at each stage of the process.

Notes Templates

- The platform contains a collection of notes templates which prompt Case Managers on the information/ steps for various steps in the process.
- As well as the system templates, you can create your own templates which will then remain available for use at any time by your organisation.

Adding of files

You can add files (JPG, JPEG, PNG, BMP, GIF, DOC, DOCX, XLS, XLSX, PPT, PPTX, EML, PDF, CSV, TXT or MSG.) to cases.

Easily add your own Fields of other required information

- The Platform has default fields of information to collect during the process but you can set up additional fields your organisation needs.
- Once setup, fields are available to all Case Managers.
- Available fields: Text: Date: Single select picklist: Email: Telephone: Numbers
- You can include fields such as Ethnicity, Gender, Unique Identifier.

At any stage you can add / update notes, edit case details, save details as a PDF, Record Value for shared learnings.

2.3 Multiple Sharing Options

At Organisation and individual level you can decide whether Case Managers can share case details with everyone, just named case managers or keep the Case details private (the existence of the case still shows to the Admin user and other Case Managers if the Case is set to private).

Ability to create groups for sharing cases with – such as All HR, F2SU Team.

2.4 Reports and Dashboard

Clear central reporting means you always understand where you are.

- Your dashboard contains charts and graphs of cases by month or quarter against any chosen field (such as location, subject, roll of raiser) enabling you to view changes over time.
- Create any reports you need for instance:
 - Open or closed cases.
 - Cases by type.
 - Cases by stage.
 - Cases by Case Manager.
 - Cases by category
 - By other chosen field
- Pin chosen reports to your dashboard.

2.5 Access

- WorkInConfidence is mobile optimised for easy use on PC, Tablet or Phone.
- Highly secure – 2 Factor Authentication option.

2.6 Easy Role Allocation

Easily allocate roles:

- Administrator.
- Case Manager.
- Reports only.

Once WorkInConfidence is set up your internal Administrator(s) can add new Case Managers within seconds.

2.7 Case Logging Feature

Ability to set up a link for staff to log cases directly into case management, in which case the appropriate manager gets notified when a case is logged for them to pick up.

2.8 Case End Survey

There is an option to send case subjects a mini survey at the end of a case to get their views on how the case was handled if you have our survey package.

2.8 Reminders

Easily add reminders to your diary from within WorkInConfidence Case Management.

2.8 AI Augmentation [Opt-in at organisation level]

WorkInConfidence Case Management is AI augmented. As of January 2026, AI summarisation of case management notes is available. These are only be visible to the Case Managers with access to the relevant cases.

3. Why WorkInConfidence

3.1 Proven:

Around 80 organisations with c. 200,000 staff use WorkInConfidence. Already used extensively across the NHS, other parts of the public sector and the private sector.

- Easy to use: Cloud based + mobile optimised makes us easy for everyone.
- Trusted: We are IASME and Cyber Essentials accredited and highly secure.
- You are in control: Clear manager and admin roles for easy management.
- We are supportive: We have exemplary onboarding and ongoing support.
- Actionable insights: We deliver clear actionable insights.

3.2 Onboarding support

WorkInConfidence provides a comprehensive onboarding programme, designed to ensure set up and launch is easy for the client, and the client and their staff are immediately able to get the full benefits of the system. As soon as a client issues a purchase order, the WorkInConfidence support team begin the comprehensive onboarding process. The aims of the onboarding process, and accompanying steps, are:

- a) Ensure the system is set up appropriately for the client on handover:

On issue of a purchase order, the support team issues a comprehensive set-up checklist to the client and arranges for run through of this in a timeframe to suit the client. This is to ensure that all settings (see customisation) are ready for the client's needs when handed over.

- b) Ensure system administrators are trained in administering the system:

Step (a) above ensures that the system is ready on handover – but we want the appropriate people in your organisation to know the steps they can take at any time to easily enhance and tailor the system for your needs; Accordingly, we run training sessions for system administrators, and have a comprehensive set of online guides and video tutorials covering key aspects of the system;

- c) Ensure managers are at ease with the system:

We help you to ensure at the outset that managers who may be using the system are aware of how it works and ready to both respond to and solicit views from staff, again through comprehensive online guides and video tutorials;

At all times, we are available to guide you through the above with a comprehensive mix of one-on-one discussions, online guides and webinars. In addition to the above we offer a quarterly catch up to discuss how else you can get more from the system.

3.3 Data Backup and Restore

WorkInConfidence is hosted on Amazon Web Services the UK.

The WorkInConfidence database run in multiple availability zones such that should the primary one fail for any reason the database would automatically switch over to the secondary zone. This would result in a short period of downtime (less than 30 minutes) and no loss of data. There is also a full database backup carried out daily.

3.4 Offboarding Support

Given the promise of anonymity we make to end users, we cannot provide a data download of all system data to be directly entered into any other system:

- On termination of contract, clients can download cases summaries in .csv and historic conversations in pdf format. Historic survey results can be downloaded in .xls or .csv.
- We are happy to agree a run-off period with us when historic conversations stay available within the system. A run-off is charged at 15% of the usual system price.

3.5 Customisation

- WorkInConfidence is highly customisable so the client is in control of whether they are using it as a staff engagement and feedback system, for whistleblowing, harassment and bullying, or for a combination of all scenarios.
- The system allows for a number of administrators within the client who can alter settings and administer the system at any time through a web interface.
- Customisation of the service is enabled in two key areas (1) Messaging on landing pages and inside the system; and (2) system settings.
- Key system settings which can be customised are:
 - Language within the system.
 - Case fields.
 - Reports.
 - Notes templates for process to be followed at each stage.
 - Survey to go to staff on closure of case.

3.6 Maintenance and upgrade windows

We aim to release upgrades to WorkInConfidence on a regular basis, typically once a month. These releases can be a mix of new functionality and bug fixes. These releases will result in the system being unavailable for a period, usually less than 30 minutes, and are carried out early in the morning UK time. Smaller hot fixes are applied without any downtime.

Any periods of planned downtime are notified in advance by a message on the system landing page.

3.7 Service levels

We aim to be available at least 99.95% of the time, apart from reasonable scheduled maintenance (either outside normal business hours or up to one day per quarter). If we exceed this, clients are entitled to seven days free for each day of service interruption as long as requested within 28 days of the outage.

Any refund would either be set off against the next invoice or paid to the client within 28 days of agreement.

System status and uptime percentages can be viewed at <https://status.workinconfidence.com>.

3.8 Support

Support is by two means:

- **Telephone:** This is via our UK contact number, which is available from 09:00 to 17:00, Monday to Friday, excluding bank holidays in England and Wales.
- **Web Chat:** Via our support site.
- **Online:** Via web form or email.

Most support issues are for advice on how to use the system or how it works.

- Immediately sortable: We will sort the user/client query there and then.
- Not immediately sortable - Critical: We will rapidly allocate resource to fix the issue and advise the client or user of the timeline.
- Not immediately sortable; Non-critical: We will advise the user or client of the timeline.



Response times

- We aim to acknowledge 95% of support requests within 2 business hrs, and all support requests within 5 business hours.
- We aim to resolve 90% of support questions within 2 business hrs and 95% within one business day.

3.9 Technical requirements

WorkInConfidence is cloud hosted so requires no installation. Use the of system requires access to a web browser (either on a desktop or mobile device) and, in most instances an email address.

As part of the onboarding process we check with clients that no enablement needs to take place to ensure system notifications are not blocked by their systems (in any event this quickly sorted).

At the date of publishing we support;

- Edge
- Firefox
- Chrome (Desktop and mobile)
- Safari (Mac and iOS)
- Opera

3.10 Ordering and Invoicing

Ordering follows the format of:

- Complete Call off Contract – with any appropriate details and specific terms added.
- Purchase order from client.
- Arrange for onboarding process to start – client contact introduced to WorkInConfidence Support Team.

Dependent on whether we and the client have agreed annual/monthly/quarterly invoicing accounts@workinconfidence.com will invoice in such periods. Where billing is monthly, we prefer, but do not insist, on automated payments (standing order).

4. Our details

WorkInConfidence is run by WorkInConfidence Limited (a company registered in England and Wales with registered address at 2 Hoathly Road, East Grinstead, RH19 1RB and registered number 08255296) ("WorkInConfidence").

5. Who We Work With

The WorkInConfidence system is available to around 200,000 staff in around 75 organisations, this number is growing rapidly and encompasses:

- Healthcare including a number of major NHS Trusts in the UK
- Banks and financial institutions / Legal firms
- Retailers
- Technology firms



- Charities
- Regulators and governmental departments

Our clients range from 100 staff - 25,000 staff each. We also have a number of clients whose staff base is spread across multiple sites, with many spread across 20-100 locations.