access
freedom to do more

G-Cloud15
Access Care Planning
Service Definition

Contents

1 Service Overview 3
2 Onboarding 4
3 Additional Service Options 5
4 Service & Support Management Details 7
5 Account Management & Customer Success 8
6 Outage and Maintenance Management 9
7 Backup and Disaster Recovery 9
8 Business Continuity statement/plan 11
9 ISO27001:13 accreditation 11
10 Development Life Cycle 11
11 Technical Requirements 11
12 Service Constraints 11

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved

1 Service Overview

Access Care Planning is the UK's leading cloud-based digital care-planning, monitoring, case-management, eMAR, workflow solution. Delivered by browser and mobile app (online/offline), it removes paper, improves quality and compliance. Part of the Access Workspace for Care suite (used by 6000+ registered providers), it's easy-to-use and helps you deliver outstanding care.

Service Features

- Comprehensive electronic records
- Fully customisable electronic records and forms
- Mobile geolocation & NFC/QR functionality - confirm staff time and attendance
- Accessed through a synchronised web portal and mobile application
- Customisable 'rules' trigger automated workflow including emails, task creation etc.
- Mobile application is fully offline capable
- Alerts for missed activities/jobs/tasks
- Inbuilt reports module - create bespoke (and exportable) reports
- Activity and task management
- Live monitoring dashboard, showing field staff's arrival and activity completion

Service Benefits

- Improve operational efficiency and save money.
- Improve service responsiveness
- Secure visit check-in and check-out
- Reduce: Duplication, communications lags, errors, safety and security breaches
- Single version of truth - no multiple/contradictory versions of records
- Application for all IOS and Android smartphones and tablets
- Web portal accessible on any web browser
- Automated real-time alerts for notification of critical issues
- Customisations can be made easily by your organisation
- Create reports on any aspect of your organisation and services
- Easy to use for all levels of technical ability

Mobile App

The easy to use mobile app is available for use on Android and Apple devices and puts the schedule, visit information and records of people receiving care in the hands of the carer. It’s secure, thanks to individual device registration meaning records can only be accessed by devices you have authorised and registered to selected individuals or teams. Check-in security is handled by geolocation combined with QR codes or optional NFC tags, our most secure option.

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved

Electronic records

Access Care Planning keeps a comprehensive and customisable set of records for each person receiving care, including eMAR and links to forms. You can adjust the priority of records so that the most important information is right in front of the carer at the point of delivery.

Forms

Create forms or use our standard set, it's extremely flexible. Each form can be duplicated, customised and triggered using workflows. Collect the form responses on mobile or tablet and have them sync back to the office immediately. There's a large selection of form elements with extensive customisation and we've got more in the pipeline.

Offline use

A carer can sync their upcoming schedule to their phone whilst they're connected to wifi or in a good signal area, then complete their visits being able to see all of the required information and save notes and other activity. Once they're back online, all their activity automatically syncs back to the office.

Alerts

Spot issues faster with real time alerts. We'll set some of these up for you as standard, but you can add your own based on risks you are monitoring. Identify risks such as refused medication or late check-ins immediately.

2 Onboarding

We aim to provide you with an excellent experience in getting up and running. Our Implementations packages range from small site implementations using our rapid FlightPath Implementation packages right up to larger solution projects where we would use our Access Implementation methodology. For the set-up process to be as successful as possible, we need to work together to achieve this.

Access FlightPath

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e-learning, so your users can learn our products at their own pace.

Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved

delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote customer projects.

Each FlightPath implementation programme from Access follows a well- defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

Clear roles and responsibilities

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

Your onward journey

Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team.

The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

3 Additional Service Options

On top of the services included within the standard FlightPath packages, the table below highlights the additional value added services that our consulting teams can provide. Please take some time to review these.

Remote User Training	Additional remote user training for end users of the system utilizing remote web technology to train your users.
Bespoke report development	Bespoke report development to your needs to work for your business and your customers. KPI, performance and auditing reports utilizing the data within your Access Care Planning system.

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved

Systems Optimization	A dedicated expert consultant reviewing your use of the system to provide targeted expert training, provide best practice advice on process improvement, re-configure areas of the system that need updating, and show new features/functionality which would add value to your business. All days show improvement measurements including time, cost, and performance improvements.
Trouble Shooting/Best Practice	A dedicated expert consultant will review your business challenges with you and recommend ways in which you can use your system more efficiently to solve these pain points.
API access/integrations	API integrations/Access to allow integrations to 3rd party systems to your Access Care Planning system including Management Information systems (MI), learning management systems (LMS), reporting, system integrations, and any other business problem that can be solved by the movement of your data.
Form Creation	A dedicated expert consultant will review your business' form needs and create these for you in your system. These can also include automation rules.
Print Templates	A dedicated expert consultant will review your business' print template needs and create these for you in your system.
API Training	Subject to Requirements. This is a fully client driven bespoke session training you and/or your team of developers in what they need to equip them with the skills to use the API's for whatever is required.
API Q&A	Subject to Requirements. This is a fully client driven bespoke session question and answer session aimed at assisting you and/or your team of developers in answering any development questions that they have regarding the Access Care Planning API's.
FlexPoints	Access FlexPoints are a cost-effective, flexible way to easily access and consume value added services including customisation, training, integration, analytics or reporting, as your business needs evolve. Access FlexPoints provide a simple way to create an allocation of points that you can call on at any time to spend on Access services. Having a banked allocation of FlexPoints provides the reassurance that as your business needs evolve you can use them to extend and modify your use of the technology.

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved

4 Service & Support Management Details

Providing you and your users with a high level of incident support is of prime importance to us. As well as being able to answer your queries, our support staff will also be able to inform you about the latest software releases, and provide hints and tips to ensure you are getting the most out of your product. To emphasise the importance of support to Access we have over 500 employees in the UK in our Support and Customer Success functions.

Support Commitment
We recognise that the systems, software and services we supply may be critical to the well-being of your business. Our aim is to ensure that you have continuous operational capability from our products. We will help you to achieve this by providing efficient support, resolving the majority of tickets at first-line contact.

We will help you maximise your return on investment by providing the best in technical assistance, advice and customer care. We own your support queries and will ensure that they are resolved as promptly and efficiently as possible.

We provide 2 main support plans as detailed below.

The Standard Plan
Get answers faster
As a Standard Plan customer you benefit from faster response times and can access our support teams via telephone and live chat, as well as through our Customer Success portal. To help your team be more productive, you are provided with continued access to our e-learning content as well as a programme of Success webinars, designed to keep you up to date with new features and share best-practice advice and guidance.

The Premier Plan
Boost productivity with direct access to the experts and achieve a higher return on investment
Our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your CSM will get to understand how you're using the technology and will advise you on how to get more from it.

Full details of our Customer Success Plans can be found here Customer Success Plans

Get to know our knowledge base
Knowledge Base is our huge database of commonly asked questions, articles and videos. All you need to do is Register and Login and you can find the answers you need any time of the day.

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved

The advanced search function not only searches articles from Knowledge Base, but links up with our Community hub to display the topics that you need. So you've got everything you need all in one place.

Can't find the article to answer your question? Not a problem. Each article links to our Community so you can ask a question, or to raise a case with the Access team.

Got a question? Ask our Community
Community connects our customers together to help them solve problems and share how to get the very best out of their Access products.

Our customers know more about using our products in their jobs than anyone else. Community gives you the chance to receive – and share – friendly expert advice that goes beyond normal customer support. Discover best practice hints and tips from peers in your industry to help you make the most of your experience with your Access product.

Each of our products has its own dedicated Community, so you can get straight to the discussions that matter to you. No unnecessary searching needed.

If a question can't be answered by Community a member of the Access team will reply. We'll make sure that no query goes unanswered.

5 Account Management & Customer Success

With over 160,000 customers using products supplied by the Access Group we have a large team involved with ensuring that our customers are able to build on their investment with Access.

This includes the Customer Success team who are specialists in specific products whose role is to ensure that our customers on Standard and Premier Success plans benefit from educational webinars to ensure that you are always taking advantage of new functionality and most importantly continuing to adopt best practice in the day to day use and set up of the software.

Our Account Management team work with our customers specializing in vertical sectors or specific products. Depending on the complexity of the customer these are either office based using the latest technology to provide our customers with the highest possible levels of service or will visit sites for face to face meetings.

Our Account managers work with you keeping our customers informed on the way emerging technologies can help their business. They prepare briefings on the business,

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved

technical and financial benefits of technology and collaborate with customers to ensure the customer is aware of the breadth of software and support that Access can provide.

6 Outage and Maintenance Management

Outage Reporting - Customers can subscribe to email alerts giving updates on scheduled maintenance and outages. We also provide all our customers with a live dashboard so you can also review uptime statistics.

Maintenance Management – downtime due to maintenance is very infrequent and is run outside of normal working hours with all customers being informed in advance to minimise disruption.

7 Backup and Disaster Recovery

The solution has been designed to cater for disasters ranging from a database restore through to a complete datacentre outage.

All backups are stored on disk and are retained for a period of 12 Months, financial data is kept for 7 years.

Backups are stored within a multi tenancy data vault and are encrypted at rest. The design of the architecture means that all data is simultaneously available in both the primary datacentre and the secondary datacentre meaning data is always backed up to another geographically diverse site.

All Servers are backed up on a daily basis at 10pm. These backups go directly to storage in the DR Datacentre to ensure off-site availability.

Retention for backups:-

15-min SQL	28 days
Daily	28 days
Weekly	3 months
Monthly	1 year for non-financial data /7 years for financial data

The solution has been designed to deliver Recovery Point Objective (RPO) and Recovery Time Objective (RTO) using the following definitions:

- RPO is the maximum time period in which data might be lost.
- RTO is the duration of working time within which data should be restored after a disaster. This time starts from when a support call is logged with Access.

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved

Standard Restore Testing
We undertake a restore test automatically on a weekly basis.

DR Testing
We run a full DR test on a 6 monthly basis, this is a non-invasive test where we bring the DR site up in an isolated fashion to ensure the services recover (Zerto allows us to do this without bringing the production environments down).

SQL Server
SQL Server Full Database backups are taken overnight as well as having SQL transaction logs taken at 15 minute intervals. This allows a database to be restored to an overnight position or to be restored to a chosen point in time within the day.

Frequently a database is restored following a user accidentally changing lots of data so the RPO does not always apply as the user may have changed the data several days ago, however the solution has been designed with a maximum RPO of 12 hours and a RTO of 6 hours.

Single Virtual Machine Failure – IIS or RDS Server
In the unlikely event of a single virtual machine (VM) failing (e.g. the IIS VM ceases to respond but the other VMs are still functioning correctly) then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed so that the files on an IIS and RDS server are fairly static with an RPO of 12 hours and a RTO of 6 Hours.

Single Virtual Machine Failure – SQL Server
In the unlikely event of the SQL Server virtual machine (VM) failing then a new instance of the VM will be started. This new instance will be an exact copy of the VM from when it stopped responding. The solution has been designed with an RPO of 12 hours and a RTO of 6 Hours.

Complete Primary Datacentre Outage
In the unlikely event that the primary datacentre goes completely dark where all VMs are lost or there is no internet connectivity an investigation period will be undertaken for 2 hours to determine the cause and decide if a datacentre promotion is required to make the secondary datacentre the primary one. Once this decision has been made the solution has been designed with an RPO of 12 hours and a RTO of 12 Hours 'Optional' Customer Copies of Backups.

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved

8 Business Continuity

The Access Group's full and most up to date business continuity plan can be requested by emailing buyer.enablement@theaccessgroup.com

9 ISO27001 Accreditation

The Access Group holds ISO27001:2022 accreditation across the entire organisation. This independently verified certification demonstrates our commitment to protecting your data. Maintaining this accreditation requires us to demonstrate effective security controls, regular staff training, and documented processes that are tested through independent annual audits.

10 Development Life Cycle

As one of our core products Access Care Planning has a detailed roadmap of improvements driven both by customers and by our own roadmap. Ongoing development against each application is supported by a development plan that has high levels of details for the next 3 months including user stories. Beyond that top line plans are in place by quarter for a further 12 month with a list of additional options waiting to be added.

New functionality is added on a regular basis (usually every quarter) with all companies benefitting at the same time.

11 Technical Requirements

Access Care Planning runs on any computer or Mobile device with a browser and Internet connectivity.

Web Browsers
Microsoft Edge, Google Chrome, Firefox, Safari
Mobile Devices
iOS, Android

12 Service Constraints

Maintenance windows as detailed above are minimal with the service so that we use all reasonable efforts to ensure that the SaaS Services are available for 99.70% of each calendar month.

As a true SaaS solution customisation is not available although the product can be configured to meet all standard set up requirements.

This Document is the property of Access UK
© Copyright 2025 Access UK Ltd | All rights reserved