

G-Cloud15

Access CM

Service Definition

Contents

1	Service Overview.....	3
2	Onboarding.....	8
3	Additional Service Options	10
4	Service & Support Management Details	11
5	Account Management & Customer Success	13
6	Backup and Disaster Recovery.....	13
7	Business Continuity.....	15
8	ISO27001 Accreditation	15
9	Development Life Cycle.....	16
10	Technical Requirements	16
11	Service Constraints.....	17

1 Service Overview

Access CM is the award-winning, supplier-hosted software application at the heart of our services to Local Authority, Community Health and Care Provider customers. It's used by over 95 Councils, as well as by a multitude of services, such as reablement, rapid response, intermediate care, supported living, extra care, residential, external care delivery, hospices and even children's services. The system is accessible via any Internet-enabled PC, laptop, tablet or mobile device in real-time 24 hours a day, 7 days a week.

By using CM's Planning and Visit screens, you can see Care Workers' availability, schedule visits, and see at a glance how the service is performing in real-time. The system also ensures you're aware of any potential failings in service, know the real-time whereabouts of your Care Workers, and can take proactive action, should visits be delivered late or missed.

CM allows you to manage:

- care Worker availability
- visit planning
- route planning
- full digital social care record including risk assessments, care plans, eMAR and medication requirements, eForms & personal outcomes recording
- non-contact time
- multi-handed visits
- Care Worker changes
- alteration of visit times including cancellations
- rolling rota patterns
- rapid response and emergency scheduling
- criteria-matching Care Workers to Service Users
- auto-optimisation of visit schedules
- alerts for double-booking of Care Workers / booking of absent Care Workers
- mileage claims and expenses.

The platform is highly flexible, and can be tailored to your exact needs, with add-on modules available depending on if you are an in-house or external care team.

Why Choose Access and CM

- We have a proven track record of supplying 95+ UK Councils' service provisions
- We have delivered proven efficiencies for our customers (please contact us for case studies)
- We are specialists in the Local Authority and NHS Trust market – our tools have been designed with Council and NHS customers in mind
- We have proven integrations with all leading case management and scheduling systems in the health and social care sector

- We have developed a highly secure, market-leading mobile app so Care Workers can record a plethora of visit information
- Our system can be delivered with a powerful business intelligence tool – helping you make the most of your care data and automate delivery of intelligence to the people who need it
- We have one solution being used across multiple services – including homecare, reablement, healthcare, day care, supported living, extra care and children's services
- We have experience of delivering significant cashable savings and extra service capacity for our customers, which can then be reinvested into their care services.

System Features

For ease of use, our cloud SaaS platform may be summarised as two main solutions:

- **Workforce management for internal/in-house teams and care providers** – this includes a full digital care record with eForms & eMAR, electronic care monitoring, care management, scheduling and rostering, payroll exports, business intelligence, a schedule optimiser, mileage calculator and integration with case management & finance systems.
- **Commissioning of care** – this includes electronic care monitoring, digital care management (e.g. eMAR, personal outcomes), integration with case management and finance systems, financial arbitration automation and business intelligence to support your strategic commissioning.

The functionality included as standard within these packages is detailed below.

Real-time Electronic Care Monitoring

CM provides you with real-time care monitoring functionality. Using the system's Visits Screen, you can see at a glance how your service is performing. Care Workers are able to log in and out of visits using a number of mix-and-match technologies – including our landline solutions and / or our mobile app, CM Mobile. All of the visit information (the visit date, time, attending Care Worker, Service User etc.) is available to office staff in real-time – so you always have the most up-to-date information on your service.

Dynamic Scheduling and Rostering

CM features comprehensive rostering functionality – perhaps the most advanced in the market. Not only is the system built for speedy, ad-hoc schedule changes, but it also allows office staff to mirror long-term rota patterns for entire care teams, which can be set to repeat in whichever pattern you like. The system also includes drag-and-drop functionality, allowing you to roster Care Workers to unallocated visits in a matter of seconds – perfect for those last-minutes changes often required in care delivery.

CM Mobile

Our market-leading mobile app, CM Mobile, perfectly complements the CM platform, and is used by Care Workers out in the field. The app seamlessly integrates with CM and allows Care Workers to log in and out of visits, see any changes to their roster, record observations, measure outcome progressions, record medication, and communicate with office staff. The app has been designed post-GDPR and features the same level security as banking apps – let us worry about protecting your data so you don't have to. The CM system has around 180,000 active carers across the UK at any one time covering over 70 million planned visits in 2023.

CMBI

The CM platform also includes extremely powerful business intelligence via our CMBI module. CMBI is able to interrogate all of your data from CM and allows you to create your own unique reports and dashboards, with your own branding and multi-page structure. Within seconds, you can convert data into dynamic visuals, such as bar charts, infographics, heat maps and more – perfect for longitudinal, management information. Alert reporting can also be defined whereby if a logical test is met then a report is automatically sent to the specified users thus allowing intelligence notifications/warnings to be distributed without staff input. CM also features over 140 standard reports to meet all of your operational needs.

Access Evo CM

Access Evo is our unique integrated software experience tailored for Local Authorities. Through Access Evo, we are delivering an integrated ecosystem of AI solutions which enable Local Authorities to transform their service delivery model

This fully connected system ensures that your Access solutions work harmoniously, with secure data flowing seamlessly between solutions, enabling faster and smarter decision-making processes.

Key Features:

- **Access Identity:** Utilises the OpenID connect protocol to provide Single Sign-On (SSO) across your Access Evo solutions.
- **Copilot:** An AI assistant that provides instant answers to questions based on an organisation's specific data, suggests actions, and helps generate content (e.g., writing case summaries or drafting emails).
- **Feeds:** One feed for everything - Consolidates tasks and notifications from all Access products into a single, intelligent list that predicts what users need and keeps them informed even when using other products or on mobile.
- **Collaborate:** Our document sharing and project communication tool. Collaborate helps customers put all their documents in one place and enables them to automatically communicate any updates across the organisation.
- **Applause:** Access Applause and its simple and speedy peer-to-peer appreciation features make recognition easy. It encourages the behaviours that align to your

mission and values, and rewards people in a way that encourages a cycle of positive momentum. With studies showing that 39% of employees don't feel appreciated at work and 65% wish they had more feedback, investing in employee recognition software is essential for businesses looking to improve their employee engagement and retention, and drive higher productivity.

- **Engage:** Customise your ideal solution, from flexible employee benefits and discounts, reward and recognition technology, internal communications tool or a combination, for the complete employee engagement solution.

Our platform helps you to:

- Deliver a wide range of employee perks and benefits tailored to your company values.
- Personalise, allocate and recognise rewards and achievements
- Foster a vibrant organisation culture through seamless internal social communications.

The following additional modules and functionality can also be purchased with your CM suite.

Digital Care Management

CM features comprehensive care management functionality, creating a full digital social care record, helping you to move to paperless care delivery. By using a mobile/tablet device out in the field, Care Workers will be able to complete care plans, electronic assessments, and reviews – all of which are received back into the CM platform.

Our solutions help you prevent duplication of effort and ensure seamless communication between office and remote staff. Our add-on modules include a form builder, so you can create your own forms, alongside comprehensive eMAR functionality - allowing you to record all of your Service Users' medication needs in one digital repository.

We are also leading the way in outcomes recording and payment on outcomes. Our outcomes module allows Care Workers to record free-text observations about Service Users, which are then received by office staff. A simple metric system allows Service Users' progress towards their goals to be tracked over time. We have also begun to establish ways in which we can combine outcomes measurement with outcomes-based commissioning and we would be only delighted to help you work towards this form of payment.

Optimisation Engine

CM features our comprehensive optimisation engine, MaxCare, which takes into account your unique priorities (i.e. distance between visits, continuity of care etc.) before automating your entire care rota – in as little as minutes. The optimisation engine will calculate the most efficient roster for your team, so you don't have to.

Mileage Wizard and Mapping

We also have an advanced mileage wizard, which uses our in-built mapping software to automate your Care Workers' mileage claims based on 'the most efficient route' – saving you even more time in administration.

Payroll Exports for Care Workers' Payments

As the integration expert within our sector, we are well-known for the interoperability of our system, and this includes our ability to prepare payroll exports from CM into whichever payroll system you're using. CM is able to handle differing rates with ease (i.e. bank holidays, weekends, sleeping / waking nights etc), and will automatically calculate the right rates for your Care Workers, based on their hours worked and the applicable rate. When exporting this information, we have extensive experience in integrating with all leading payroll systems in our industry – making us the perfect partner for your interfacing needs.

LiveIntegrate Data Collection

When working with your external Care Providers, our LiveIntegrate solution automatically collects the visit data from the provider's scheduling and monitoring solutions so data is transferred to the commissioner for visibility of delivery allowing proactive contract management, risk management, safeguarding and automated payment capabilities. In 2023 the CM platform processed over 28 million 3rd party system import requests.

Financial Arbitration

Finance Manager is a module within the CM platform, designed to automate your payments to Care Providers based on your own unique business rules. Finance Manager integrates with all leading case management and scheduling systems – comparing actual, planned and commissioned care delivery. The module features an easy-to-use traffic light system – showing you which invoices have been automatically accepted for payment, and those that need a bit more inspection – meaning your team only have to look at any exceptions that don't meet your business rules.

Access Messenger

Access Messenger is a secure, two-way communication platform designed for Local Authority or Healthcare organisations to share critical information and updates instantly via text or voice messages with their provider markets. It enables real-time dialogue with individuals or groups, supports document sharing, and ensures every interaction is encrypted and fully auditable for compliance. Accessible via web or mobile, it offers features like push notifications, read receipts, and voice notes to streamline communication and boost efficiency. By fostering transparency and inclusivity, Access Messenger enhances staff engagement, accelerates decision-making, and creates a reliable, responsive environment for care management.

Access Data Platform

With the wealth and diversity of information and data available across Access products, Access is delivering a state-of-the-art Business Intelligence and Reporting platform. The ever-growing volume of data spread across our solutions, both structured and unstructured requires a sophisticated and scalable proposition. Not only will the platform surface valuable and timely data insights, but will also provide sophisticated predictive analytic models and explore AI capability to enable customers to drive real value and service improvements. Access has a working partnership with Microsoft to re-imagine our analytics capabilities using the power of Microsoft Fabric.

This innovative digital approach integrates data movement, processing, transformation, real-time event routing, and report building, all within a single environment and empowers users to unlock the potential of their data.

Access NotesCentre

Access NotesCentre is our AI-powered solution designed to dramatically reduce the time practitioners spend on administrative tasks—currently up to 60% of their workday. Using voice dictation, typed, or pasted text, it intelligently organises and summarises unstructured content into professional case notes using predefined templates. Built on a private Large Language Model specifically trained in social care terminology, NotesCentre is tailored to each council's local context and nuances, ensuring secure, ethical AI that inspires confidence.

The solution works seamlessly across smartphones, tablets, and laptops with offline capability. NotesCentre can also record meetings, identifying speakers and extracting key actions and decisions. It can generate multiple outputs from a single input, such as formal minutes, accessible summaries, or translations into different languages, all while keeping the practitioner in control with preview and editing capabilities before committing content to the system.

2 Onboarding

Access Implementation Methodology (AIM)

Our consultants follow a 4-phase, 12-step process and we propose a scale of project, management and administration that's appropriate for your specific needs. From evaluation, planning and design, through to implementation of your business solution.

Phase 1, Pre-project planning

Step 1: Needs analysis

After detailed consultation we will clearly define your needs in a proposal document that identifies the benefits you will experience by updating your systems.

Step 2: Solutions demonstration

We will take you through a tailored demonstration of your proposed solution and work with you to agree which elements will be included in the initial project. We listen and take account of all your feedback and will provide a quotation outlining the anticipated cost of your project.

Step 3: Sales handover

Having finalised the project's scope and agreed commercial terms, we prepare a handover document from sales to the project team who will partner you throughout implementation. They will meet with all appropriate members of your team to ensure continuity throughout the process.

Phase 2, Configure & Install

Step 4: Definition

The Access project team will work with you to define the structure and control processes that will guarantee the success of your project. Documents that we provide you at this stage will cover all your project objectives, the full specification and success criteria. This gives total clarity over individual tasks and responsibilities to ensure you're fully informed going forward.

Step 5: Solutions workshops

This step helps your project team become fully immersed in the proposed software. We map business processes to functionality so that you can understand how the solution will look and feel.

Step 6: Confirmation of requirements

Following your feedback from the solutions workshops, we will confirm the detailed actions and solution components necessary to meet the project success criteria we identified earlier.

Phase 3, Training

Step 7: Configuration

The components identified in Step 6 are delivered and a User Acceptance Test (UAT) system is built ready for you to carry out a pilot test. We support configuration and fine tuning of all the variables within the system to match your specific requirements.

Step 8: User Acceptance Test (UAT)

The UAT is conducted in a workshop environment for your staff against an agreed test plan. At the end of this step you will be ready to go live.

Step 9: Education

With a fully designed, installed and tested system now in place, we will train your internal training staff on all relevant areas of the software. We are highly skilled at adapting our training to the learning styles of each of your staff members. Our default assumption is to provide a “train-the-trainer” approach, however if needed, we can train all of your staff with some additional time added to the project.

Phase 4, Support

Step 10: Go Live

The test system is converted into a live working environment ready for the processing of real-time business transactions. This is managed by a pre-agreed go live check list to ensure all possible circumstances are considered and addressed. We will be on-hand to answer your questions and support your users throughout this time, helping them to get maximum clarity and impact from the software as they become increasingly confident.

Step 11: Support handover

We prepare a handover document and deliver it to our ongoing support team. This document contains all the information our support consultants need to answer any future queries you may have.

Step 12: Post project review

Your experience is extremely important to us. Shortly after you go live we will request feedback on your experience of the implementation process to help us further refine our delivery processes. We then agree sign-off for the project.

3 Additional Service Options

The table below highlights the additional value added services that our consulting teams can provide. Please take some time to review these.

Pay Provider Setup and Training	The rate administration function allows Care Providers and Local Authorities to set up and maintain control of generic pay rates. It has the ability to set up and maintain their own pay rates. This would be for a CM customer who is using Monitoring or Scheduling or both.
Invoice Provider Setup and Training	The rate administration function allows Care Providers and Local Authorities to set up and maintain control of generic Invoice rates. It has the ability to set up and maintain their own Invoice rates. This would be for a CM customer who is using Monitoring or Scheduling or Both.
Refresher Training	Training is available to be provided to end users as refresher training if they have used the system previously but have had a break and requires refresher session on the system.
CM Training New Starters or additional end users	Training is available to be provided to new starters within your organisation as they come on board. The benefit of receiving this

	training is that they are provided the same expert knowledge and training directly from the system supplier.
Shifts and Runs Training as Extra on top of Scheduling Implementation	Customer will be provided with Shifts and Runs Training
Shifts and Runs Rota Pattern Consultancy and Creation	Customer will be provided with Rota Pattern Consultancy and Creation
New third party solution Integration	Customer will require to purchase another day PM to assist with new interface migration
Digital Care Management Form Creation	Digital Care Forms can be created for you as part of a consultancy piece of work in preparation for your go live and use of forms within the system.
Assessment Form Creation	A consultant will scope your requirements and configure your bespoke assessment forms
Rota Pattern Analysis	If implementation of Council and multiple Providers is involved there would be a requirement for Rota Pattern Analysis as part of the project. For Provider is basic analysis of rota patterns and would be more analysis for council implementations.
Additional Check in Calls in calls as agreed in Welcome Meeting	If you would like further check in calls during project implementation this can be agreed and booked to allow additional Onboarding support.

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.

FlexPoints

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.

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

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

Our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your Customer Success Manager 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 [Access 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.

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, 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 Backup and Disaster Recovery

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

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.

All systems hosted within DC2 are backed up as standard with the following retention policies:

- SQL Servers

- Full backups every Saturday retained for 3 months except last Saturday of the month which is retained for 6 months **
- Differential every night (excluding Fri & Sat) retained for 1 month
- Logs every 15 minutes retained for 1 month.
 - **Pay data full backups retained for 5 years
- Non-SQL Servers
 - All non-SQL servers have a standard retention of 30 days

All backup data is replicated between Data Centres to ensure data is available in the event of the loss of a site.

Note: For SQL server backups only the database backed up, anything stored outside of this on these servers is exempt and cannot be restored.

Retention for backups:-

15-min SQL	28 days
Daily	28 days
Weekly	3 months

Backups will be deleted upon client request following termination of contract, otherwise they will be aged out via retention policies.

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.

Ransomware/Malware

In the event of a server or service being infected then a system will need to be restored from a backup taken prior to the infection taking place (if available), in this event RPO & RTO times are not applicable.

Standard Restore Testing

We undertake restores automatically on a weekly basis via an automated process to a separate server to ensure that the backup is consistent and valid on restore.

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).

As standard all systems will be configured with Bronze DR, in the event of a disaster the system will be recovered within a secondary Data Centre from backup with the following RPO and RTO SLA's. No DR testing is included within this option:

- SQL Server
 - 15 minute RPO
 - 12 Hour RTO
- Non-SQL Server
 - 24 Hour RPO
 - 12 Hour RTO

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.

7 Business Continuity

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

8 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.

9 Development Life Cycle

Access CM has a detailed roadmap of improvements driven by our customers, technological advancements and statutory requirements.

We take a partnership approach to developing and refining our product roadmap and delivering on the promises we make. This includes individual meetings with our customers, customer request forums and active participation in user groups.

The developments set out in the roadmap are the direct results of this partnership approach and reflect individual specifications refined through this rigorous process. UI/UX prototyping tools form a critical part of this process, allowing wireframes and example user journeys to be demonstrated to our customers at an early stage, gaining valuable feedback before development begins.

This allows us to ensure that what we develop meets the wider needs of our customer base and provides users with the opportunity to help shape the end product.

10 Technical Requirements

Access CM runs on any computer or mobile device with a browser and Internet connectivity. The backoffice CM solution (CallConfirmLive!) is delivered over the Internet using Citrix. System access is available from any Internet-enabled device with a standard Internet browser installed. CM Mobile is a native app for Android and iOS and can be downloaded and updated from their respective app stores.

In order to make the most of modern web standards to deliver exceptional products with great user experiences on secure platforms, we develop, verify and support our products on the following browsers:

- Chrome (desktop)
- Firefox (desktop)
- Edge (desktop)
- Chrome (mobile)
- Safari (mobile)

For operating systems, we aim to support the latest version plus the two versions directly preceding it.

When a manufacturer ends support for their operating system or browser, we will also cease support of our products on those platforms. This means that we will no longer continue to verify our products or fix bugs on those unsupported platforms. We may also launch new features that are incompatible with those unsupported platforms. However, there may be instances where The Access Group decides to continue support for their products on platforms that have had their support ended, and customers will be made aware of this exception.

11 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 99.8% of each calendar month.