access
freedom to do more

G-Cloud15 Access Elemental Patient Engagement Portal Service Definition

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1 Service Overview

The Access Elemental Patient Engagement Portal (PEP) is a comprehensive digital platform that transforms how NHS trusts engage with patients, delivering secure, integrated, and user-friendly digital services that enhance patient experience whilst reducing administrative burden. The platform enables seamless communication between patients, clinicians, and wider care teams, supporting early intervention and improved outcomes. It offers features such as:

- Full integration with Rio EPR
- NHS Login authentication & NHS App integration for unified patient experience
- Patient Care Aggregator connectivity for comprehensive health records
- Digital appointment booking and management (supports online appointments)
- Secure document sharing and form submission
- Digital completion of patient assessment form & PREM & PROM questionnaires
- Multi Channel comms with Trust/Clinician & Patient (E.g. Email/SMS etc)

By integrating with NHS App and leveraging NHS Login for secure authentication, the Patient Engagement Portal ensures patients have a single, trusted point of access to their care information. Its interoperability with Rio EPR and Patient Care Aggregator, supports a fully connected care journey and eliminates data silos. Designed to meet NHS Digital standards for security and accessibility, the portal not only improves patient engagement but also enables mental health trusts to deliver efficient, joined-up care in line with the NHS Long Term Plan.

Access Evo for Elemental

Access Evo creates a fully connected ecosystem that brings Elemental together with other Access solutions, enabling social prescribers, community connectors, employment advisors, and other teams to work more efficiently and collaboratively. By integrating data and workflows across health, social care, and community services, Evo ensures that frontline teams have the tools they need to deliver personalised, joined-up support for individuals.

Key Features for Frontline Teams:

- **Access Identity:** Single Sign-On (SSO) via OpenID Connect, allowing quick and secure access to Elemental and other integrated solutions without multiple logins.
- **Copilot:** An AI assistant that helps users find answers fast, draft case notes or summaries, and suggest next steps based on organisational data saving time and improving service quality.

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- **Feeds:** A unified task and notification feed that consolidates updates from all connected systems, helping social prescribers and advisors stay on top of referrals, appointments, and actions.
- **Integrated Platform:** Seamlessly connects Elemental with social care case management (Mosaic), and Mental Health EPR (RIO) reducing duplication and ensuring a holistic view of the individual's journey.
- **Collaborate:** Secure document sharing and communication tools that make it easy for teams to share updates, resources, and progress across organisations and sectors.
- **Engage:** Create a customised engagement solution that supports your team's wellbeing and collaboration. Options include internal communication tools, recognition and reward features, and resources that help social prescribers, community connectors, and advisors stay connected, motivated, and informed.

2 Onboarding

As a cloud-based platform and a Software as a Service (SaaS) product, upgrades and updates are included in the annual licence fee. Improvements, enhancements and maintenance are included in quarterly releases.

3 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 3 main support plans as detailed below.

The Essential Plan

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The online service The Essential Plan is available to all Access customers as part of your license fee and provides you with easy-to-access online support for all your queries, facilitated via our Customer Success portal.

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 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.

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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.

4 Account Management & Customer Success

The Buyer agrees to procure compliance with all terms of use (as specified in this Specification and in the Access terms and conditions the Supplier has submitted to G-Cloud 14) by all of the Buyer's users.

The Buyer acknowledges and agrees that the Supplier reserves the right to terminate a User's access to the Software if the Supplier deems their use to be in breach of the applicable terms of use.

5 Particulars of processing

Category of Data Subject	Professional Users
Type of Data Being processed	• Identity and Contact data • Job data • Administration rights • Professional Details • Login details • Case and attendance notes created
Permitted Purposes	To enable Professional Users to access and use the Software for the purposes of implementing, managing and evaluating the relevant Client's Social Prescription Programme Where it has been agreed between the Buyer and the Supplier, the Software includes a Data Extraction Tool which enables an individual (requested by the Buyer and set up by the Supplier) to extract and download personal data related to the Social Prescription Programme. This may include Personal Data relating to Patients as well as Personal Data relating to Professional Users (and their case notes and attendance notes and referrals uploaded on to the Software).

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Permitted Recipients	The Software will be set up so that information about Professional Users will be accessible to certain other Professional Users as well as the Buyer (and anyone designated as a Data Exporter by the Buyer). Where it has been agreed between the parties, the Software may also be integrated with a third-party platform used by the Buyer (and/or other Professional Users). The Supplier is permitted to transfer Professional User Data: (i) to its staff (only for the purposes of assisting in the provision of the services) (ii) sub-Processors (with consent from Client and only for the purposes of assisting in the provision of the Services).
Duration	For the duration of the Supply Agreement

Category of Data Subject	Patients (as defined in the body of the Agreement)
Types of Data Being Processed	• Identity and Contact data • NHS number • Health and well-being data (which may include Special Categories of data) • Attendance notes • Records of consent • Attendance at community events
Permitted Purposes	To enable the Patient to receive Social Prescription Services under the Buyer's Social Prescription Programme and the Professional Users to manage the provision of the same and evaluate the same. Where it has been agreed between the Buyer and The Supplier, the Software includes a Data Extraction Tool

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	which enables an individual (requested by the Buyer and set up by The Supplier) to extract and download personal data related to the Social Prescription Programme. This may include Personal Data relating to Patients as well as Personal Data relating to Professional Users (and their case notes and attendance notes and referrals uploaded on to the Software).
Permitted Recipients	The Software will be set up so that information about Patients can be shared between Professional Users (at their discretion) and may be accessible to the Buyer. Some of the information might also be available to the Patient if they have an account on the Software. The Supplier is permitted to transfer Patient Data: (i) To its staff (only for the purposes of assisting in the provision of the services) (ii) data Processors (with consent from Client and only for the purposes of assisting in the provision of the services).
Duration	For the duration of the Supply Agreement

6 Account Management & Customer Success

With over 160,000 customers using products supplied by the Access Group (with the Elemental business as part of this group) we have a large team involved with ensuring that our customers can 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,

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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.

7 Outage and Maintenance Management

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.

8 Backup and Disaster Recovery

Commented [SG1]: Clarify this is correct for your solution

The solution is backed by the AWS's (Amazon Web Services) RDS (Relational Database Service), which provides a fully managed solution to host, manage and backup our system database needs. Amazon RDS automates common administrative tasks, such as performing backups and patching the software that powers our database. With Multi-AZ deployments, Amazon RDS also manages synchronous data replication across Availability Zones (multiple physical locations in London) with automatic failover.

https://aws.amazon.com/rds/faqs/#Multi-AZ_Deployments

Backups consist of full nightly snapshots (performed during our backup window at 4am), followed by a running transaction logs (as updates to the DB Instance are made). This means that we can restore to any specified 'point-in-time' if requried. This is managed automatically by AWS. All data is encrypted at rest.

https://aws.amazon.com/rds/faqs/#Automatic_Backups_and_Database_Snapshots

Restore Testing
We undertake periodic restore testing.

Primary Node Failure
In the event of of the primary node failure, the 'stand-by' (which is an up-to-date replica of the primary) is promoted to become the new 'primary' which then starts accepting database operations. Amazon RDS generate a new 'stand-by' instance and sychronise the data automatically.

Complete Outage
In the unlikely event that both AWS Avilability Zones fail, we can restore from the most recent 'point-in-time' backup. This can take between 30 minutes to an hour to restore, and will happen in parallel with the restoration of any other services that were affected.

9 Business Continuity

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

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10 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.

11 Development Life Cycle

Commented [SG2]: IF YOU HAVE A MORE PRODUCT SPECIFIC UPDATE YOU CAN ADD PLEASE DO

Access Elemental and its associated modules (as detailed above) has a detailed roadmap of improvements driven by customers, statutory requirements, and our own roadmap.

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 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.

New functionality is added on a regular basis (we have monthly relases to live) with all customers benefitting at the same time of platform wide releases.

12 Technical Requirements

Access PEP runs on any computer or mobile device with a browser and Internet connectivity.

Web Browsers Supported:

- Chrome
- Firefox
- Safari
- Microsoft Edge

13 Service Constraints

Severity Classification:

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Severity Classification	Description:
A	Emergency: Client's business is stopped due to Error that is preventing Client's operational use of the Software (or significant functionality within the Software).
B	Urgent: Client's business is significantly impaired or restricted due to Error that, while not preventing, is severely degrading Client's operational use of the Software.
C	Non-Urgent: Client's business is impaired or restricted due to Error that either occurs rarely or for which a viable workaround is available.
D	Low: Error causing little or no impact upon Client's business.

Maintenance Service:

Subject to agreement on the Severity Classification of the Error, The Supplier will use all reasonable endeavours to respond to and fix (including by means of workaround, temporary fix or bypass procedures). Errors within the target timescales set out in the table below:

Severity Classification	Target Response Time	Target Fix Time
A	Within 2 Support Hours	Within 8 Support Hours
B	Within 4 Support Hours	Within 32 Support Hours
C	To be targeted for next Maintenance Update	To be targeted for next Maintenance Update
D	To be targeted for future Maintenance Update based on relative priority	To be targeted for future Maintenance Update based on relative priority

Where a workaround or bypass procedures has/have been provided, a fix will be targeted for the next Maintenance Update.

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.

Maintenance management: Downtime due to maintenance is very infrequent and is run outside of normal working hours so there is minmum disruption to customers.

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We shall use commercially reasonable endeavours to make the Software available 24 hours a day, seven days a week, except for (a) planned maintenance carried out between 7pm and 7am; and (b) unscheduled maintenance provided that The Supplier has given the Buyer at least 6 hours' notice of the same.

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