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# G-Cloud15

# Access Adam Digital CHC Service Definition

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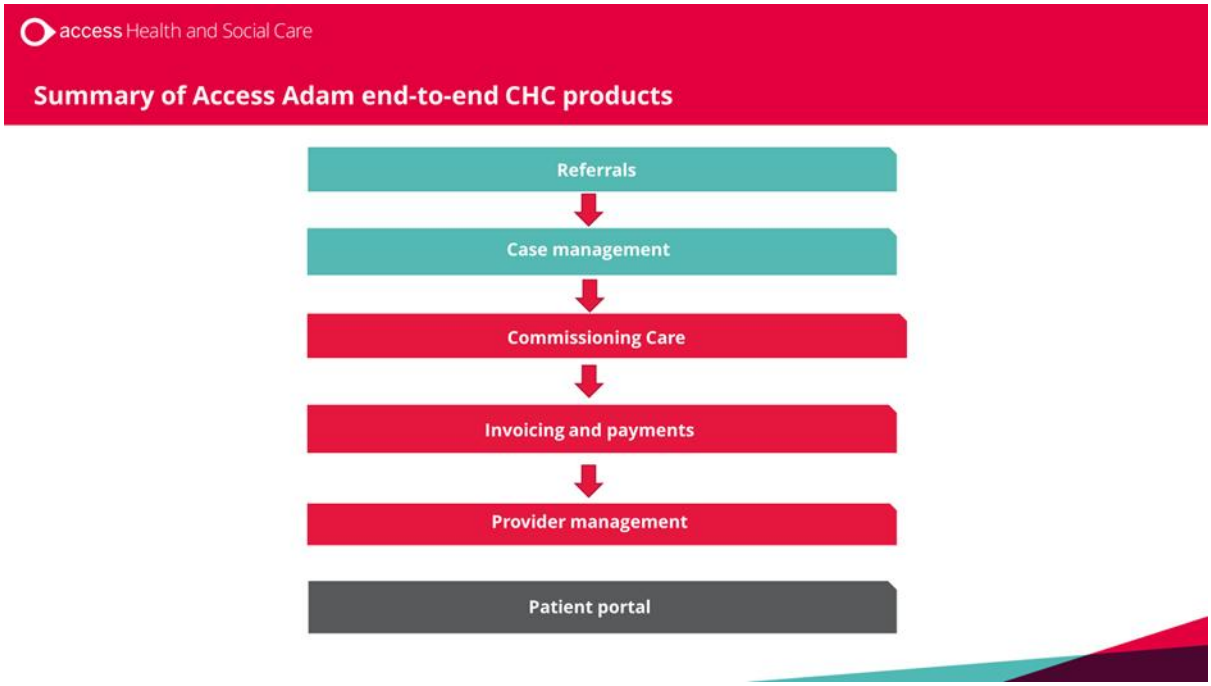



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## 1 Service Overview

Access Adam Digital CHC facilitates the effective management of Continuing Healthcare (CHC) activities via a modern technology platform across the following integrated product modules:

- Referral management
- Case management
- Brokerage and placement management
- Invoicing and payment management
- Provider engagement and management
- Patient Portal Access
- Data and reporting management

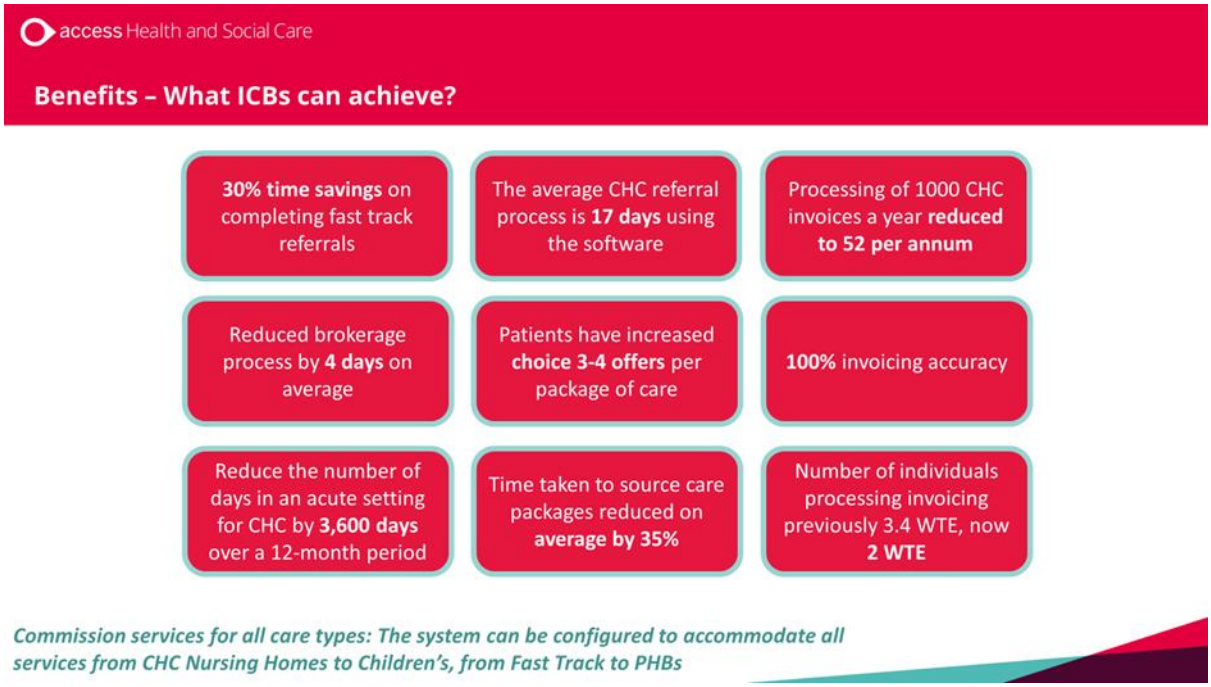



Built to support NHS England's drive towards digital CHC, the Access Adam product is the most established end to end solution in the market, providing customers with the confidence that, as their needs change, whether internally or due to the wider integration agenda, our solution can be tailored and amended to meet their needs across all CHC activity.

Utilising our leading technology platforms to support CHC staff, Access has shown that it can deliver improved results for ICBs, patients, and providers - whether that be faster eligibility decisions, improved quality of care, or greater value for money. Additionally, using the technology to streamline processes means internal resources can focus on care delivery and market sustainability rather than focusing on repetitive and unnecessary Backoffice administration.


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The platform allows you to efficiently manage your CHC activity in one place using secure, robust, and scalable infrastructure. Rich reporting capabilities are built in, which gives you the insight to better inform decision making at every stage of the process. The platform is highly configurable, modularised, and can be operated alongside third party solutions, meaning ICBs can tailor the solution to meet their local needs.




**Key Features:**

**Referral management**

The Access Adam Referral Management Module digitalises the end-to-end referral process streamlining activity for ICB's, Referrers and Patients. The tool helps staff to process referrals more effectively. Workflow automation, locally defined templates, and centralised management tools allows ICB staff to ease their workload and speed up processing time. By streamlining and automating referral processes and basic tasks, ICBs typically process CHC referrals 25% - 50% quicker. The tool works across all referral types from CHC to Section 117 and ensures a transparent and accountable referral process.

The tool supports collaboration between ICB users and external users submitting the referrals (i.e GPs and Nurses.). They enter data directly into the mobile compatible solution wherever and wherever they need, with required documentation automatically produced from the inputs.

**Case management**


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The CHC Case Management Solution allows ICBs to manage and record all patient activity in one place. You can easily store and track all the information related to a patient's care pathway including assessments, care packages, invoices, reviews, and safeguarding/information logs. The system is already integrated with NHS Spine and all major finance systems ensuring that data remains accurate and up to date. An intuitive anomaly process ensures discrepancies against Spine PDS are flagged and factored into decision making activities.

Centralising all patient activity and having key data readily available to relevant staff means decisions are never made in isolation, ensuring effective care delivery for every patient.

14 ICBs have already moved to the Case Management System and are realising excellent results year on year.

**Brokerage and placement management**

Our solution digitises the brokerage process for the procurement and management of care related services. We fully personalise and define essential and non-essential service elements through a template driven requirement process. The process is fully customisable and auditable including supplier input, automatic offer review, supplier ranking and contract award. The  management tool enables you to reduce your unit costs and bring rapid efficiency savings to your teams. Regarding results, ICBs typically save up to 7% in their unit costs.




**Invoicing and payment management**


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Automated electronic invoicing and payments management are part of the core solution, enabling you to deliver a more secure, accurate, and accountable invoicing and payments process and eliminate manual work. The process is completed efficiently, from service agreement (contract) through to service receipting and invoice creation and ending with payment.

You and your providers have full visibility throughout the payments cycle. We eliminate manual "three part" matching and make any adjustments that are needed in a controlled and auditable way.

**Provider engagement and management**

Our Provider Management Tool is an innovative provider and market management solution, built for NHS and local authority staff and care providers. ICBs and local authorities can now efficiently manage large and complex provider markets and maintain high service standards via a cutting-edge technology solution. Once it's in place, staff are supported in their communication with, and management of, all local care providers.

Our system contains a built-in messaging tool where users can interact and share information with providers, within a controlled environment. Functionality includes read receipts, audit trail and the ability to add individuals to conversations.

The tool supports ICBs contract and quality management practices including:

- Better understanding market performance and activity through the compilation of relevant data at all required levels including national and local markets and providers
- Collating and evaluating quality returns required under contract
- Reviewing quality performance using multiple dashboards including performance charts and Google maps
- Understanding how their ICB performance compares to other ICBs
- Interacting with providers online including messaging, document sharing and creation, management, and completion of tasks.

**Patient Portal**

The Access Adam Patient portal is an integrated module designed to give patients visibility of their care record, key documentation, care package info and track their progress through the referral stages. Aligned with NHS Federated Data Platform Initiative, the portal helps ICS/ICB organisations work towards having more integrated, accessible and transparent care systems.

The tool allows patients to access their information, referrals, assessments, decisions, reviews, PHBs, letters, appeals and care package. Patients can request to change their general information and email addresses through the system which will be double checked by the ICB before updating.

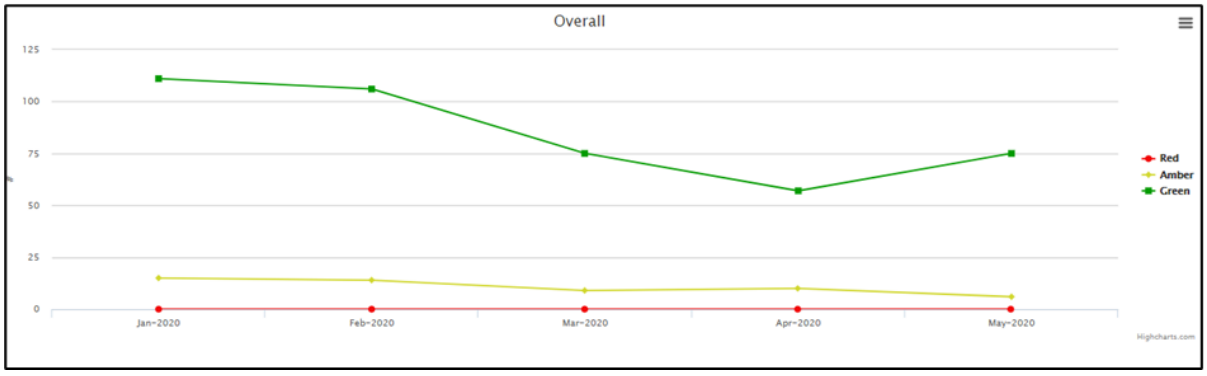

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- The product is in use in multiple ICB's and is delivering:
- A reduction in calls and queries from patients where the information is now readily available through the tool
- Better data quality with Patients able to maintain key records such as their own contact details
- Reduction in letters and other documentation being printed and posted as this can be viewed online
- Queries about letters, appointments and status' of referrals
- Better engagement with Patients who now feel more involved in their care

## Data and reporting management

Using the inbuilt data and reporting functionality its quick and easy to check providers performance and manage project risks. All performance and interactions for each provider is captured and made available to you. This includes your provider quality and contract/compliance records. Additionally, notes, tasks, messaging, and surveys functionality all form part of the technology solution.

| Reporting Period | E-Form Template Name | E-Form # | Date Completed | E-Form Overall Score | Quality & Safety | Regulation | Wellbeing and Experience | Workforce |
|---|---|---|---|---|---|---|---|---|
| May 2020 | Monthly Quality Monitoring Form (Nursing) | FO8980 | 11/06/2020 | 59.95% | 77.21% | 74.50% | 55.83% | 41.50% |
| May 2020 | Monthly Quality Monitoring Form (Nursing) | FO8987 | 15/06/2020 | 60.74% | 79.24% | 62.50% | 60.42% | 39.17% |
| Mar 2020 | Monthly Quality Monitoring Form (Nursing) | FO8515 | 15/04/2020 | 66.80% | 71.63% | 62.00% | 59.17% | 69.58% |
| Jan 2020 | Monthly Quality Monitoring Form (Nursing) | FO6499 | 17/02/2020 | 69.02% | 89.49% | 87.00% | 60.00% | 51.17% |
| Feb 2020 | Monthly Quality Monitoring Form (Nursing) | FO7497 | 25/03/2020 | 70.02% | 73.62% | 65.00% | 55.83% | 80.83% |




## Access Evo Adam

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


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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.
- **Integrated Platform:** It connects various software products, such as Social Care Case Management, Finance, Education, and Brokerage into a single, unified experience, removing the need to juggle multiple tools.
- **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.


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## 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.


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**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 configure and tune 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 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. We can train all of your staff or, if preferred, we will train your in-house.

**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-site 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.


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## 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.

| | |
|---|---|
| Scoping and Workshop | Additional consultancy time for Scoping and Workshop to help drive out the Confirmation of Requirements |
| Administrator Training | 1 hour training covering all key areas for administration of expense (maximum 3 delegates) |
| Dimensions Plug-in Configuration | Additional installation of Dimensions plug-ins as required |
| Credit Card Training | Explanation of both methods (import & manual entry) and a guide on how to set them up and match/submit the lines |
| Project & Task Training | Explanation of upload process and how filters can be applied, as well as how to request the details based on Expense Type |
| End User Champion Training | Agreement to train up to 4 End User Champions to then knowledge share and train end users / assist administrators (submitting, approving etc) |
| Enterprise Documentation Creation | Creation of collateral for Enterprise customers to cover bespoke requirements specific to the environment. |
| Bespoke Consultancy | Any consultancy required to be conducted on behalf of the customer. For example, Emergency Admin/Data entry, Reconfiguration etc. Please contact Onboarding with requirements for quotation |
| 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.<br>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


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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**
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**


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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,


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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.

## 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.

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.

**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.


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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

As one of our core products Access Adam 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


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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.

## 10 Technical Requirements

Access Adam runs on any computer or iOS / Android mobile device with a browser and Internet connectivity.

**Web Browsers**

- Microsoft Edge
- Microsoft Internet Explorer 11
- Chrome
- Safari
- Opera

Owing to the way most browsers now auto-update, our testing can only practicably focus on the most recent version of the browser publicly available at the time of testing a development item. As part of our regression and release procedures, wider application testing is performed to ensure continued compliance.

## 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 99.70% 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.


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