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G-Cloud15

Access NotesCentre

Service Definition

Contents

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

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1 Service Overview

Access NotesCentre is a sophisticated, AI-powered voice dictation, transcription and transformation solution designed to reduce the administrative burden on public and third sector workers. The application addresses a critical challenge in the sector by significantly reducing the time professionals spend manually typing documentation and case notes, allowing them to dedicate more time to supporting vulnerable people.

Core Functionality

Users provide an input via the application in either a text or audio recording format. That input is combined with a pre-written prompt developed by the customer in conjunction with Access Group specialist staff and sent to our secure AI model.

The prompt defines how the input should be amended; e.g. summarised and reorganised into a specific format such as a case note with key safeguarding concerns highlighted, or built to align with a defined form structure such as an assessment. Users select from dropdown lists of templates tailored to their specific needs during the recording process. The system can adjust tone and language within outputs, supporting both formal professional documentation and simplified language.

The solution operates as a cloud-native platform hosted on Microsoft Azure infrastructure within the United Kingdom. Users can access NotesCentre through two channels: a web-based browser application compatible with desktop and laptop computers, or dedicated native mobile applications for iOS and Android devices. This flexibility ensures professionals can capture information in the office or whilst working in the community.

A particularly valuable feature for community-based workers is the mobile application's offline capability. Recordings can be captured immediately after visits without requiring internet connectivity, with automatic synchronisation occurring when the device reconnects online. This ensures no data loss whilst maintaining the flexibility essential for fieldwork.

The transit and retention of the data is entirely secure, through integration with the Access Group's proprietary instance of GPT-4.0 mini, and shared with the customer, providing a much greater level of alignment to data protection regulations than use of third party, especially generic, AI tools.

AI-Powered Transcription and Summarisation

Access NotesCentre employs advanced AI technology to transform recorded audio into structured, usable documentation. The system utilises Microsoft Azure Cognitive Services for real-time speaker diarisation, which employs voice biometrics and acoustic modelling to separate and identify individual speakers throughout recordings. This creates distinct speaker segments in transcriptions with confidence scores for each attribution, achieving transcription accuracy rates exceeding 95%.

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Template Management and Customisation

Template creation and management occurs through collaboration between Access and the implementing organisation. Each site defines and configures templates during implementation, with ongoing support for amendments and refinements. The AI Plugin Designer represents a breakthrough innovation, enabling organisations to create bespoke AI models that understand local terminology, preferred phrasing, and specific documentation standards.

Users only view templates approved for their site, with approval built into the creation and amendment process. Whilst templates are not directly shared between sites, learning from similar functions across the customer base informs continuous improvement, meaning organisations benefit from lessons learned elsewhere whilst maintaining uniquely customised templates for their usage.

Review and Quality Assurance

Access NotesCentre maintains human oversight at the centre of its workflow. Once a recording has been processed by the AI model, the output is presented to the user as ready for review within a rich text editor. Only after the user confirms satisfaction with the content and makes any necessary amendments can information be finalised. This ensures the AI enhances rather than replaces professional judgement, maintaining the human expertise essential to effective social care.

The system provides multiple export options including formatted documents, direct copy-paste functionality, and structured data formats. Integration capabilities allow outputs to populate various system templates through standard APIs and data export formats, providing seamless workflow integration whilst maintaining data sovereignty.

Consent and Compliance

The solution incorporates comprehensive consent management aligned with GDPR Article 9 special category data processing requirements. When initiating a recording, the system prompts users to confirm they have sought and received consent from all participants. Without this confirmation, recordings cannot commence.

A comprehensive audit trail captures participant identification, timestamp logging, and withdrawal capability. Emergency override provisions exist for safeguarding situations with enhanced documentation requirements. This consent framework has been validated across eight local authority pilot programmes.

Security and Data Protection

Security represents a fundamental design principle throughout Access NotesCentre. The solution employs a private, dedicated AI infrastructure ensuring complete data isolation and protection. The AI model operates within the Access Group's secure environment with no connection to public AI systems. All customer data is processed

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exclusively within this private model, ensuring information is never exposed to, shared with, or used for training by public AI platforms.

Data segregation occurs through tenant-based architecture, with dedicated storage containers and role-based access controls preventing cross-contamination between organisations. Users can only access recordings they have created, divided into categories including inputs being processed, failed inputs, draft outputs, and finalised shared outputs. Administrative access exists solely for user management and deletion where required.

Encryption standards include HTTPS over TLS 1.3 for data in transit and AES-256 encryption for data at rest. Mobile applications implement additional security layers including hardware-backed keystores on Android, Keychain Services on iOS, and certificate pinning for API endpoints. The iOS implementation enforces App Transport Security compliance, preventing insecure HTTP connections. Runtime security checks detect jailbroken or rooted devices, whilst automatic data masking protects sensitive information when applications are backgrounded.

All data storage, processing, and management occurs within the United Kingdom, specifically within Microsoft Azure UK South data centres. There is zero data retention by transcription partners once processing completes, ensuring complete compliance with UK data sovereignty requirements. The system implements active-active configuration between London and Woking data centres with automatic failover capability and real-time data replication.

Access maintains ISO 27001 certification with annual audits and Cyber Essentials accreditation. The hosting infrastructure includes comprehensive physical security controls at data centres meeting SOC 2 Type II and Tier 3 standards, with 24-hour on-site security personnel, biometric access controls, environmental monitoring, and fully redundant power systems.

Platform Experience

The user interface has been deliberately designed for simplicity based on extensive pilot testing across eight local authorities. Social workers describe the interface as "invisible" because it integrates seamlessly into existing routines without requiring complex navigation or lengthy training. The mobile-first approach recognises that 60% of documentation occurs outside the office, enabling immediate capture of information after visits.

Pilot programmes have demonstrated measurable outcomes including 67% reduction in documentation time, with some users saving over 45 minutes per visit. This efficiency gain translates into additional capacity for direct service user support whilst reducing the administrative burden that contributes to workforce pressures.

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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 trainers.

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.

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.

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Scoping and Workshop	Additional consultancy time for Scoping and Workshop to help drive out the Confirmation of Requirements.
Additional Training	Ad-hoc additional training requirements.
Additional Template Creation	Access consultancy to support additional template creation.
Bespoke Consultancy	Any consultancy required to be conducted on behalf of the customer. For example, Emergency Admin/Data entry, Reconfiguration etc.
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.

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 3 main support plans as detailed below.

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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 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.

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.

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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

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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

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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.

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9 Development Life Cycle

As one of our core products Access NotesCentre 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.

10 Technical Requirements

The Access NotesCentre application is delivered as a cloud-native solution hosted on Microsoft Azure infrastructure within the UK. The solution is fully browser-based and does not require additional browser plug-ins, client software, or special communications protocols beyond standard HTTPS.

Supported Browsers:

- Internal Users: Microsoft Edge (Chromium) - primary support
- External Users: Full range including Chrome, Firefox, Safari, Edge
- Mobile: iOS Safari and Android Chrome via responsive design

We are commited to maintaining compatibility with latest browser releases.

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.

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