access
freedom to do more

G-Cloud15

Access Rio Smart Notes

Service Definition

Contents

1 **Service Overview** 3

2 **Onboarding** 4

3 **Service & Support Management Details** 6

4 **Account Management & Customer Success** 8

5 **Backup and Disaster Recovery** 8

6 **Business Continuity** 9

7 **ISO27001 Accreditation** 9

8 **Development Life Cycle** 9

9 **Technical Requirements** 10

10 **Service Constraints** 11

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

1 Service Overview

Access Rio Smart Notes is a mobile application that enables healthcare professionals to audio record patient appointments and automatically generate structured clinical summaries for integration with the Rio clinical system.

Core Functionality
The application synchronises with Rio's appointment system, displaying scheduled appointments with comprehensive patient information including NHS numbers, Rio IDs, contact details, and clinical alerts. Healthcare professionals can record consultations directly from their mobile devices, with the system capturing explicit patient consent before recording commences.

During recording, the application displays a real-time audio waveform and prevents device sleep modes to accommodate lengthy consultations. Recordings can be paused, resumed, or restarted as required to support the natural flow of clinical encounters.

AI-Powered Documentation
Upon completion of recording, artificial intelligence transcribes and organises the consultation according to locally configured templates. The AI system parses information into structured sections such as presenting complaints, clinical history, examination findings, assessment, and management plans, transforming conversational content into documentation that aligns with clinical standards.

AI-generated timestamps enable clinicians to navigate to specific portions of recordings when reviewing summaries, supporting verification and clarification of clinical details.

Offline Capability
The application provides robust offline functionality, allowing healthcare professionals to access previously viewed appointments for up to seven days without internet connection. Recordings can continue during network outages, with data automatically synchronising and uploading once connectivity is restored.

Data retention follows NHS Records Management Code of Practice guidelines, with audio files automatically deleted after successful submission to Rio whilst appointment information is maintained for seven days after initial viewing.

Review and Quality Assurance
Healthcare professionals must review and verify all AI-generated summaries before submission to Rio. The review interface presents summaries in an editable format, allowing modifications to individual sections whilst providing the ability to replay corresponding recording segments for verification.

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

Visual status indicators clearly communicate the processing state of each recorded appointment, ensuring healthcare professionals understand what actions are required.

Template Configuration
The application supports multiple documentation templates that can be configured to match organisational requirements. This includes SBAR formats for handovers and specialised templates for different clinical specialties, enabling the system to adapt to diverse clinical contexts rather than imposing standardisation.

Security and Governance
Access control utilises Access Identity integration with Rio's role-based access controls, ensuring healthcare professionals view only appropriate appointments and patient records. The consent recording process creates an audit trail, whilst encryption protects temporarily stored recordings on devices. Audio files are automatically deleted after successful submission to minimise security risks.

Clinical Integration
The application integrates patient alerts and allergies throughout the documentation process, supporting safe clinical practice. Integrated communication features enable direct calls from displayed phone numbers, facilitating immediate follow-up when clinical findings require prompt attention.

By reducing administrative documentation burden, Access Rio Smart Notes enables healthcare professionals to redirect time towards direct patient care whilst maintaining consistent, comprehensive clinical records.

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

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

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 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

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

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.

3 Service & Support Management Details

At Access we know why you choose our products, it's because you want to be more successful. We want you to be more successful too. So, we've taken a good long look at how we support you, taken on board feedback and made it a whole lot better. We're not just here to support you when you need a hand - we're here with you at every stage of your journey.

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 for Access Rio Smart Notes as detailed below.

The Essential Plan

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

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.

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

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.

4 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.

5 Backup and Disaster Recovery

Access Rio Smart Notes is hosted on Microsoft Azure with comprehensive backup and disaster recovery capabilities designed to protect customer data and ensure service continuity.

Backup Strategy:

All data is backed up automatically in accordance with healthcare data retention requirements. Backups are encrypted at rest and stored across geographically diverse Azure regions to ensure data protection and availability. Backup schedules and retention periods are designed to support both operational recovery requirements and regulatory compliance obligations.

Recovery Objectives:

Access Rio Smart Notes has been designed to deliver appropriate recovery objectives for a cloud-based healthcare system. Recovery Point Objective (RPO) and Recovery Time

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

Objective (RTO) targets are established to minimise data loss and service disruption in the event of an incident. Specific recovery targets will be confirmed as part of contractual agreements and reflect the critical nature of electronic patient record systems.

Disaster Recovery Testing:

Access undertakes regular disaster recovery testing to validate the recoverability of the service and ensure that backup and recovery procedures remain effective.

Infrastructure Resilience:

The platform is architected for resilience with data replicated across geographically diverse Azure regions. The platform incorporates redundancy, automated monitoring, and alerting capabilities to detect and respond to incidents rapidly, minimising the risk of service disruption.

Incident Response:

In the event of a service incident, Access support teams follow established incident response procedures to assess impact, communicate with affected customers, and restore services in line with agreed recovery objectives.

6 Business Continuity

Access maintains comprehensive business continuity and disaster recovery plans to ensure continued service delivery in the event of significant business disruption.

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

7 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.

8 Development Life Cycle

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

Access is committed to a collaborative approach to product development, working closely with customers and the wider healthcare community to shape the Access Rio Smart Notes product roadmap and ensure the platform continues to meet evolving clinical and operational requirements.

Customer Engagement:

Our Product team works directly with healthcare organisations to understand the challenges they face and to identify solutions that deliver meaningful value. We regularly undertake collaborative workshops and feedback sessions with customers to inform product development priorities and to validate proposed solutions before development commences.

Healthcare Sector Engagement:

Access actively participates in NHS programmes and initiatives, working with organisations including NHS England, NHS Digital, Integrated Care Boards, and industry bodies to ensure Access Rio Smart Notes aligns with national strategies and standards. This engagement helps shape our product vision and ensures Access Rio Smart Notes supports wider healthcare transformation objectives.

Continuous Delivery:

As a SaaS platform, Acess Rio Smart Notes is developed and deployed using continuous delivery practices. Updates, enhancements, and new capabilities are deployed seamlessly to all customers, ensuring organisations benefit from ongoing innovation without the need for disruptive upgrade projects. This approach enables Access to respond more rapidly to customer feedback, regulatory changes, and emerging requirements.

Customer Involvement:

Access actively encourages customer involvement in product development activities, including participation in design workshops, early access programmes, and user testing. This collaborative approach helps ensure that new capabilities are validated with real-world clinical and operational input before wider release.

9 Technical Requirements

Access Rio Smart Notes is delivered as a cloud-native SaaS platform, minimising local technical requirements and infrastructure dependencies for customer organisations.

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

Access Requirements:
Access Rio Smart Notes is designed to be compatible with standard NHS mobile device configurations, supporting clinical staff working across multiple locations and care settings.

Integration Requirements:
Access Rio Smart Notes supports integration with NHS national systems and infrastructure where required, including:

- NHS Spine services (including patient demographic services and national data sharing capabilities)
- NHS authentication and identity management services
- Local care record and shared care systems
- Third-party clinical and administrative systems

Specific integration requirements and technical prerequisites will be confirmed during scoping based on organisational requirements and existing system landscape.

Technical Standards:
Access Rio Smart Notes is designed to comply with relevant NHS technical standards, including information governance, data security, and interoperability requirements. Specific compliance documentation can be provided on request.

10 Service Constraints

Service Availability:
Access Rio Smart Notes is delivered as a managed SaaS platform with target availability of 99.9% per calendar month. As a cloud-native platform, updates and enhancements are typically deployed without service disruption. In exceptional circumstances where maintenance activities may impact service availability, Access will provide advance notice to customers.

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