access
freedom to do more

G-Cloud15 Access Provider Manager Service Definition

Contents

1 Service Overview 3
2 Onboarding 7
3 Additional Service Options 11
4 Service & Support Management Details 12
5 Account Management & Customer Success 13
6 Backup and Disaster Recovery 14
7 Business Continuity 14
8 ISO27001 Accreditation 14
9 Development Life Cycle 15
10 Technical Requirements 15
11 Service Constraints 15

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

1 Service Overview

The Provider Manager suite is proven to increase market intelligence / understanding, care quality and service sustainability in today's fragile market. Over 55 Councils and NHS Trusts already rely on Provider Manager for evidence to help improve care services.

Access Provider Manager was developed with Directors of Social Services to deliver dynamic data collection, analysis and reporting to increase care quality and mitigate risks of Provider failure. The solution helps councils meet their duty of care, achieving a quality-assured, sustainable, diverse care and a supported care market for both Adults, Children's Services and Continuing Healthcare.

Provider Manager has the power to deliver market insight, automates Provider returns, transforms the Provider assessment process and facilitates micro-commissioning. It also gives you a secure central repository for vital Provider and contract information, making it easy to access.

Ultimately, Provider Manager empowers you with data to ensure care services are safe, effective, and high-quality to meet the needs of local citizens.

Provider Manager is a SaaS eco-system, designed to help you deliver quality care. Available in modules, you can mix-and-match the features your Council or NHS Trust needs to enable safe, high-quality care that meets the needs of local people.

Provider Directory
A centralised, multi-tenanted database offering real-time provider information and KPI dashboards. Integrates with CQC and Ofsted data, plus management of on-regulated care services.

Document Management
Ability to create a library of documentation at a locality level such as Policies & Procedures, Contracts, and frameworks of good practice. Also gives users the ability to store individual document against providers, such as contract schedules, performance management reports, and more. Access aims to provide a single source of truth for all provider-related documentation—supporting compliance, improving efficiency, and laying the foundation for fully connected, data-driven social care oversight

Quality Assurance
Delivering reliable, high-quality adult and children's care to local citizens is an essential service provided by commissioners. Despite its importance, there's no question it can be an administrative burden for all parties, especially keeping up to date with assessments and benchmarking care delivery.

The Quality Assurance module makes Provider assessment and corrective action planning easy. It takes the administrative headache of Provider assessments away by

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

providing one, simple-to-use, central resource to manage assessments and most importantly, create corrective action plans to improve care quality.

The Quality Assurance module:

- helps health and social care professionals identify and rank risks to prioritise assessment resources
- gathers evidence from Providers, Care Workers and Service Users within one central, easy-to-use across outcome platform
- allows outcomes and standards of care to be assessed using an evidence-based approach
- delivers workforce efficiency by utilising technology to capture information at the point of assessment
- allows areas of improvement to be identified and agreed with the Care Provider through a shared private portal
- shares quality information from the commissioner and regulator on Providers in your area through a public portal.

> ***"We have experienced a 26% improvement across outcome domains utilising [Provider Manager] QA."***
>
> ***– Luton Borough Council***

Provider Returns

Provider Returns assists Local Authorities and NHS Trusts to carry out tailored data collection from Care Providers, either at a local, regional, or sub-regional level. Provider Returns:

- helps Local Authorities monitor their local care market to ensure Care Act obligations are met
- ensures Providers are complying with their contractual arrangements
- allows Providers to self-audit as an additional quality assurance method
- provides pre-quality assurance visit questionnaires to collect information from Providers – before they receive a QA visit
- allows Councils to monitor responses in real-time, as well as print and edit submissions, and set reminders.

Relationship & Contract Management

Tools for logging provider interactions, secure messaging, meeting scheduling, and contract oversight with framework management. Contract Management functionality within the ecosystem would allow councils to store, track, and manage framework agreements, contract expiry dates, and performance obligations in one place. A contract management system that is data-driven, AI-enabled, and fully integrated, allowing Local Authorities to move from reactive oversight to proactive market shaping—improving quality, reducing risk, and delivering better outcomes for citizens through a single integrated app with a single source of truth.

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

Provider AI

Provider AI is an advanced natural language interface embedded within the Access Provider Manager ecosystem and integrates with data seamlessly, designed to transform how Local Authorities interact with provider data. Instead of navigating multiple modules or compiling spreadsheets, teams can simply ask questions in plain English—such as "Which providers have outstanding safeguarding concerns?" or "Show me providers rated inadequate with contracts expiring in six months." The system instantly queries data across the Provider Directory, Quality Assurance, Provider Messenger, NotesCentre, Contract Management, and Relationship Management modules, returning actionable insights, trend analysis, and formatted reports in seconds. Key capabilities include AI-powered search and filtering, automated alerts for emerging risks, longitudinal quality tracking, and the ability to generate improvement plans. By eliminating manual data extraction and enabling proactive oversight, Provider AI frees staff to focus on strategic tasks like market development and provider relationship management. It also supports regulatory readiness by providing rapid access to evidence for CQC and Ofsted inspections.

In summary, the Access Provider Manager ecosystem delivers a future-ready ecosystem for Local Authorities which combines AI-driven insights, integrated workflows, and secure data management to improve outcomes, reduce administrative burden, and strengthen social care markets.

Social Care Landscape

Access Landscape is a sophisticated market insight and analytics tool designed to give Local Authorities a clear, actionable view of their social care markets. It consolidates diverse datasets into easy-to-understand dashboards and reports, enabling councils to monitor risk, manage contracts, and make informed commissioning decisions. With flexible "mix-and-match" insight packs, Landscape provides visibility across key areas such as population and demand forecasting, spend and activity analysis, capacity and availability, and quality and risk profiling. By visualising trends and patterns, it helps identify emerging issues early and supports proactive interventions. Additional features include real-time and historical reporting, public plug-ins for Market Position Statements, and tools to streamline responses to Freedom of Information requests. Ultimately, Landscape empowers decision-makers with dynamic intelligence to improve care quality, ensure market sustainability, and accurately predict future demand

Standard components of the Social Care implementation of Landscape include analytics coverage of, for example:

- **Population & prevalence** - brings together population / demand driven data sets from a variety of sources to understand macro changes affecting demand for care across various health & social care categories.
- **Quality & capacity** - understand how Providers are performing through data gathered from various sources. Use this to identify anomalies and benchmark on a Regional, Sub-Regional or Local level and with the ability to filter data by Brand, Provider, and individual locations. Ability to interrogate a variety of quality

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

indicators from a various data sources in a number of different ways e.g. intervention dashboard.

- **Market Insight** – provides easy access to the LG Inform Plus dataset with pre-prepared analytics on all the key data so this can be analysed alongside all the Provider Manager intelligence
- **Quality Assurance** - a set of pre-defined reports and dashboards that provide leaders with the ability to view comparative Provider-focused analyses across participating commissioner organisations, with the ability to drill-down from an aggregated view into the underlying detail where appropriate.
- **Spend & activity -** take a deep dive into commissioned spend activity across different client groups and service Providers. Gain insight into what you are buying from which Providers, what rates you are paying, and benchmark within services / localities as well as regionally and nationally from other published local authorities.
- **Future demand modelling** – the Demand Model combines statistical forecasting with artificial intelligence to make accurate predictions about activity levels and help monitor and measure change.
- **Market Position Statements** – optional add-on to build an automated modern approach to Market Position Statements. Accessible and near real-time insights from the Provider Manager Landscape modules are dynamically presented using Power BI, which can be embedded into your websites/portals etc.

The optional 'third party plug-ins' collection allows interactive analytics components from within the staff facing Landscape solution to be deployed embedded in public facing webpages to power, for example, interactive Market Position Statements and 'self-serve' Freedom of Information tools.

Social Care Landscape Risk Profiler

Councils across the UK are seeing unprecedented volumes of Care Providers closing and handing back care packages. Provider Manager Risk Profiler was created for Councils and NHS Trusts to bring together a range of intelligent data sources, which highlights care Providers at various stages of risk. This allows you to keep a watchful eye over the Provider market and protect your care users from disruption.

Risk Profiler:

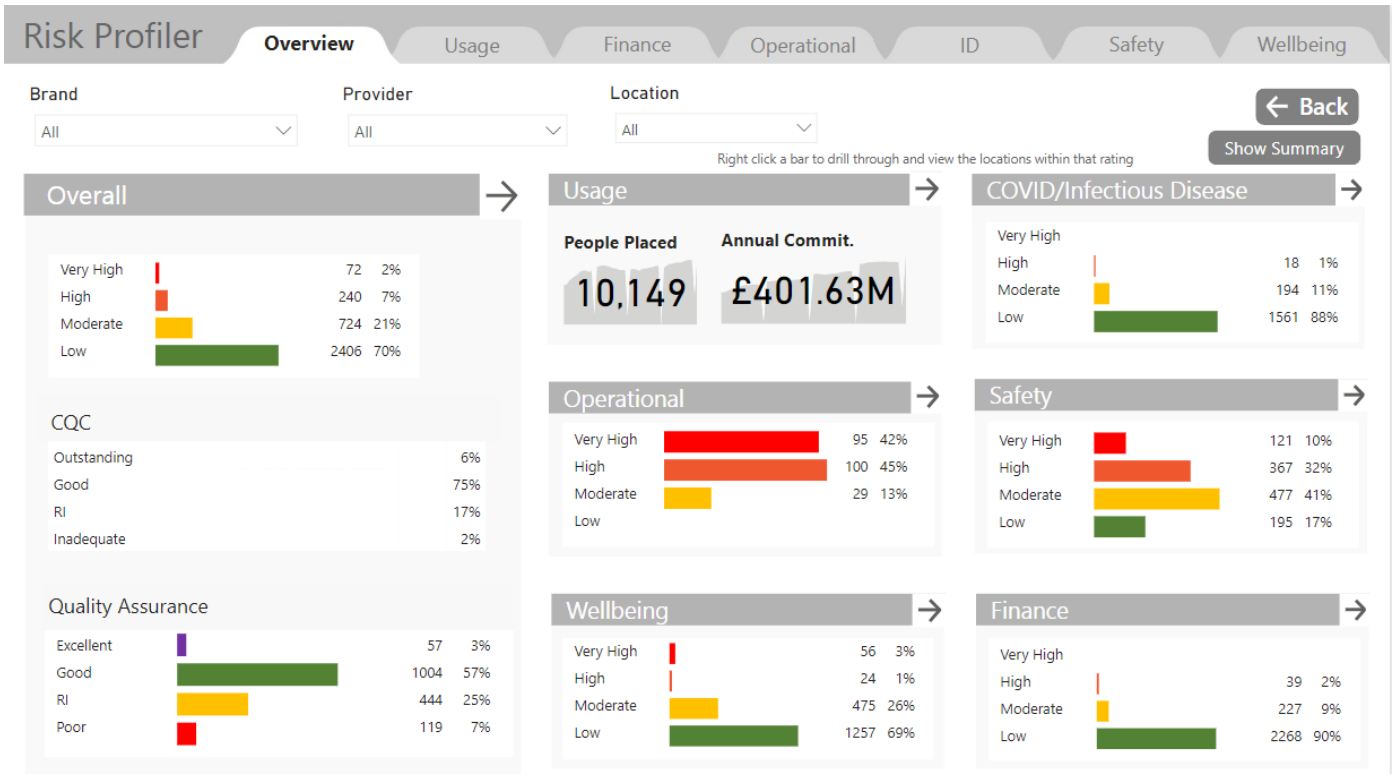
- gives you access to Provider and branch detail (both regulated and non-regulated), including service type
- provides you with a view of who else nationally contracts with the relevant Provider
- provides regulator detail, including CQC ratings
- gives you company credit check ratings using a standard and consistent approach

"Risk Profiler identifies issues that we would have otherwise been unaware of."

– Stockton-on-Tees Borough Council

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

- is fully integrated with Provider Managers' Quality Assurance module ratings, as well as electronic care monitoring information (where available), and commissioner commentary if stored in the Provider Register module.



Access Evo Provider Manager

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

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

Key Features:

- **Access Identity**: Utilises the OpenID connect protocol to provide Single Sign-On (SSO) across your Access Evo solutions.
- **Copilot:** An AI assistant that provides instant answers to questions based on an organisation's specific data, suggests actions, and helps generate content (e.g., writing case summaries or drafting emails).
- **Feeds:** One feed for everything - Consolidates tasks and notifications from all Access products into a single, intelligent list that predicts what users need and keeps them informed even when using other products or on mobile.

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

- **Collaborate:** Our document sharing and project communication tool.
  Collaborate helps customers put all their documents in one place and enables them to automatically communicate any updates across the organisation.
- **Applause:** Access Applause and its simple and speedy peer-to-peer appreciation features make recognition easy. It encourages the behaviours that align to your mission and values, and rewards people in a way that encourages a cycle of positive momentum. With studies showing that 39% of employees don't feel appreciated at work and 65% wish they had more feedback, investing in employee recognition software is essential for businesses looking to improve their employee engagement and retention, and drive higher productivity.
- **Engage:** Customise your ideal solution, from flexible employee benefits and discounts, reward and recognition technology, internal communications tool or a combination, for the complete employee engagement solution.
  Our platform helps you to:
    - Deliver a wide range of employee perks and benefits tailored to your company values.
    - Personalise, allocate and recognise rewards and achievements
    - Foster a vibrant organisation culture through seamless internal social communications.

The additional options available with Access Provider Manager have been detailed below.

Access Connect

Access Connect provides a highly secure and persistent connection to the Access Hosted Platform, allowing for in-house Council reporting teams to connect to Provider Manager databases and extract the data they need. This is compliant with Windows Server and Desktop architecture, empowering on-premise data warehouses, reporting solutions and data analytics without the need for supplier intervention.

Access Messenger

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

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

Access NotesCentre

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

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

2 Onboarding

Access Implementation Methodology (AIM)

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

Phase 1, Pre-project planning

Step 1: Needs analysis

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

Step 2: Solutions demonstration

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

Step 3: Sales handover

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

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

Phase 2, Configure & Install

Step 4: Definition

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

Step 5: Solutions workshops

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

Step 6: Confirmation of requirements

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

Phase 3, Training

Step 7: Configuration

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

Step 8: User Acceptance Test (UAT)

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

Step 9: Education

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

Phase 4, Support

Step 10: Go Live

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

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

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.

Provider Manager Provider Returns Refresher, New Starters or additional end users Training	Customer will be provided with refresher or new starter training for Provider Manager Provider Returns
Go Live Support	Support provided remotely when going live and contact available to quickly triage and resolve your go live issues to make go live run smoothly.
Project Management	If you would like further support from Customer Service Delivery Manager during the implementation additional days can be agreed.
System Health Check	Health Check for the system to suggest any improvements to the use of the system
User Setup	Every Additional 20 users would require 1 hour additional service implementation support
Training	Additional training can be delivered (Refresher, New User and Business Area ie Commissioner focussed sessions)
New Data Set Import	We are able to import additional local data sets (pending extract review)
FlexPoints	Access FlexPoints are a cost-effective, flexible way to easily access and consume value added services including customisation,

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

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 2 main support plans as detailed below.

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

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

will get to understand how you're using the technology and will advise you on how to get more from it.

Full details of our Customer Success Plans can be found here Access Customer Success Plans.

Get to know our knowledge base
Knowledge Base is our huge database of commonly asked questions, articles and videos. All you need to do is Register and Login and you can find the answers you need any time of the day.

The advanced search function not only searches articles from Knowledge Base, but links up with our Community hub to display the topics that you need. So you've got everything you need all in one place.

Can't find the article to answer your question? Not a problem. Each article links to our Community so you can ask a question, or to raise a case with the Access team.

Got a question? Ask our Community
Community connects our customers together to help them solve problems and share how to get the very best out of their Access products.

Our customers know more about using our products in their jobs than anyone else. Community gives you the chance to receive – and share – friendly expert advice that goes beyond normal customer support. Discover best practice hints and tips from peers in your industry to help you make the most of your experience with your Access product.

Each of our products has its own dedicated Community, so you can get straight to the discussions that matter to you. No unnecessary searching needed.

If a question can't be answered by Community a member of the Access team will reply. We'll make sure that no query goes unanswered.

5 Account Management & Customer Success

With over 160,000 customers using products supplied by the Access Group we have a large team involved with ensuring that our customers are able to build on their investment with Access.

This includes the Customer Success team who are specialists in specific products whose role is to ensure that our customers on Standard and Premier Success plans benefit from educational webinars to ensure that you are always taking advantage of new functionality and most importantly continuing to adopt best practice in the day to day use and set up of the software.

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

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

Access Provider Manager is hosted in Microsoft Azure so all our infrastructure is backed by Azure's "High Availability" 99.9% uptime guarantee. There is automatic failover to alternative locations for both the database and Power BI. Only a Power BI outage would materially affect the end users as the BI App would be unavailable. If there were any outages to the data processing/database layer the only impact on end users would be the inability to refresh the data model. An outage of 24 hours (unheard of in Azure cloud) would simply mean the data was live as of 2 days ago rather than the previous day.

Differential back-ups are taken every 6 minutes which enables us to do precise point-in-time restorations at any point in the previous 30 days. This is regularly tested in Development and Test environments.

Information on Azure backups and disaster recovery can be found here:

https://docs.microsoft.com/en-us/azure/azure-sql/database/business-continuity-high-availability-disaster-recover-hadr-overview?view=azuresql

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

Information on Microsoft Azure's business continuity can be found here:
https://docs.microsoft.com/en-us/azure/azure-sql/database/business-continuity-high-availability-disaster-recover-hadr-overview?view=azuresql

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

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

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 Provider Manager 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 months 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.

User forums
We organise regular user groups in order to facilitate best use of the system and to inform product development. Your Customer Success Team will facilitate dialogue, knowledge sharing and new requirement needs across our UK customer base, ensuring that the system remains up to date with any legislative changes or new market trends.

10 Technical Requirements

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

Web Browsers
Internet Explorer 11 and above, Firefox, Safari, Google chrome

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.

A single instance of the solution is deployed and configured to meet the needs of a particular customer business domain, for example Local Authority Adult Social Care. To service the needs of further domains within the same customer, for example Local Authority Children's Services, requires procurement of further instances/licences.

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