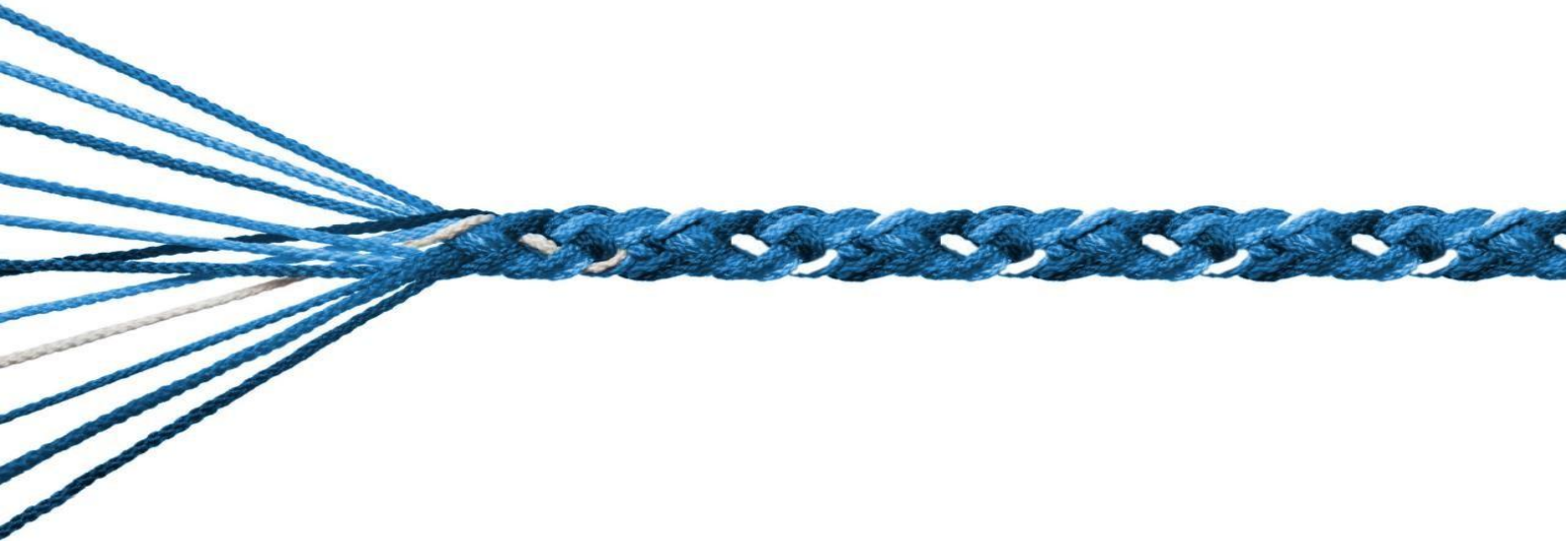




Service Definition

CasparGov

September 2026

Commercial in confidence

Contents

Introduction.....	1
Service Description	1
Associated Services.....	1
Value Proposition	1
Managed Services and Security	3
Data Protection Standards and Procedures.....	3
Hosting Infrastructure	3
Data Back-Up and Restoration	3
Business Continuity Statement / Plan.....	3
Privacy by Design	4
Accessing the Service.....	5
Ordering and Invoicing.....	5
Pricing Overview	5
On-Boarding	5
Service Management.....	5
Service Levels.....	5
Service Credits.....	5
Outage and Maintenance Management	5
Off-Boarding	6
Customer Responsibilities.....	7
Technical Requirements.....	8
Client-Side Requirements.....	8
Account Management and Ongoing Development	9
Development Lifecycle of the Solution	9
About Idox	10
About CasparGov	10
Giving Back to Communities through Social Value.....	11
Case Studies	12
Contact us	13

Introduction

CasparGov is a cloud-hosted case and financial management service used by public sector organisations managing the affairs of adults who lack capacity or require support to manage their financial and personal affairs. This Service Definition describes what the service provides, how it is delivered, and how it aligns with G-Cloud expectations.

Service Description

CasparGov combines case management and client money management within a single web-based application. It allows organisations acting as Deputies or Appointees for adults who lack capacity or require support to manage their financial and personal affairs to maintain client records, manage financial activity, reconcile bank transactions, and produce statutory and operational reports.

The service is provided as Software as a Service (SaaS) and accessed via a web browser.

Associated Services

The following services are commonly provided alongside CasparGov:

- Onboarding and implementation support, including environment setup, configuration and training
- Data migration support using standard migration templates
- Guidance and support for implementing reconciliation workflows
- Customer support via the supplier's support channels

These services are delivered where contractually agreed as part of implementation or ongoing support arrangements.

Value Proposition

CasparGov provides a single, structured system for managing client case information and financial administration within public sector Deputyship and Appointeeship services. By bringing together case management, client money management and reporting in one service, it supports consistent data capture, auditability and oversight across the full client lifecycle.

The service supports organisations to manage complex caseloads by centralising client information, financial activity, documentation and decision records, reducing reliance on spreadsheets and disconnected tools. This supports clearer visibility of client circumstances, compliant, well-structured financial oversight and consistent production of statutory and operational reports.

The service supports:

- Centralised client and case records, including notes, visits, tasks and key decisions.
- Structured financial data, including planned and one-off transactions and reconciliation.
- Management of client assets such as property, vehicles and personal possessions.
- A document library for storing and accessing client-related documents within the client record.
- Workflow and process tracking to support legal and administrative activities.

- Standardised statutory and management reporting outputs.
- Audit visibility through logged system activity.

Managed Services and Security

CasparGov is delivered as a fully managed cloud service. Idox is responsible for hosting, maintaining, securing and updating the application, including infrastructure management and controlled release of changes.

Access to the service is controlled through named user accounts and role-based permissions. Administrative roles allow customers to manage users, permissions and configuration within the system.

The service includes audit logging functionality to record user activity for operational and compliance purposes. Security management is governed by the supplier's formal information security management framework.

Data Protection Standards and Procedures

Customers remain responsible for determining the lawful basis for processing personal data, defining retention periods and ensuring appropriate use of the service in line with UK GDPR and organisational policies.

CasparGov supports customers in meeting their data protection obligations by providing structured data storage, access controls and audit logging. Key features include:

- Role-based access controls to restrict user permissions.
- Audit trail reporting to review user activity.
- Client deactivation functionality where records should no longer be actively used.

Hosting Infrastructure

CasparGov is provided as a Software as a Service (SaaS) solution hosted in a managed cloud environment. Customers access the service over the internet using a supported web browser. There is no need to install software locally and the service cannot be self-hosted.

Browser compatibility and connectivity requirements are confirmed during onboarding.

Data Back-Up and Restoration

Data backup and restoration are managed by Idox as part of the hosted service.

Backup arrangements form part of our information security management framework and are designed to support recovery of service data in the event of system failure, data loss or other incidents.

Backups include application data and user-generated content. Access to backup systems is restricted to authorised personnel, and restoration activities are logged and controlled.

Detailed backup schedules, retention periods and recovery objectives are managed operationally and are not defined within this Service Definition.

Business Continuity Statement / Plan

Business continuity and disaster recovery arrangements for CasparGov are managed by Idox as part of the hosted service.

The service is supported by resilient cloud infrastructure and continuity planning that considers system availability, supplier dependencies, staffing resilience and the ability to continue service delivery during disruptive events.

Business continuity controls are reviewed and maintained in line with our information security and continuity management processes.

Privacy by Design

CasparGov supports privacy-by-design principles through:

- Role-based access control
- Separation of administrative and operational permissions
- Audit logging of user activity
- Controls for deactivating client records

These features support accountability and controlled access to personal data.

Accessing the Service

Users access CasparGov via a supported web browser using secure login credentials. Two-factor authentication can be enabled where applicable.

Browser compatibility and access prerequisites are confirmed during onboarding.

Ordering and Invoicing

CasparGov is ordered through the G-Cloud framework. Invoicing is handled in line with the contractual terms agreed between the customer and Idox.

Pricing Overview

Pricing for CasparGov is defined in the associated G-Cloud pricing document. This includes subscription pricing and any applicable implementation or support costs.

On-Boarding

Onboarding is designed to be specific to the priorities of each customer, supported by Idox using a structured implementation approach.

Onboarding typically includes:

- Provisioning of the live environment
- User and permission setup
- Configuration of reference data
- Data migration using standard templates
- User training and access to documentation
- Support during go-live

Service Management

Day-to-day service management is shared between Idox and the customer. We manage the infrastructure, application availability, security controls and change management. Customers manage users, permissions, configuration and operational use of the system through administrative functions within CasparGov.

Reporting and background processing tasks are handled within the application, with reports generated asynchronously and made available for download.

Service Levels

Service availability, support hours and response targets are defined contractually. The service is generally available continuously, subject to planned maintenance. Planned maintenance activities are communicated in advance, where reasonably practicable. Service levels are not defined within this Service Definition and are available on request.

Service Credits

Service credits, where applicable, are defined in the contractual terms agreed between the customer and Idox. Where service credits are not included in the contract, no service credit scheme applies.

Outage and Maintenance Management

We operate formal procedures for managing incidents, outages and planned maintenance. Changes and maintenance activities are controlled through the change management process, including risk assessment, testing and approval. Emergency changes follow defined procedures and are documented and reviewed after implementation.

Off-Boarding

On termination of the service, customers can request access to their data in an agreed export format. Off-boarding arrangements are handled in line with contractual terms and data protection requirements.

Customer Responsibilities

Customers are responsible for:

- Managing user access and permissions.
- Ensuring the accuracy of data entered into the system.
- Defining retention and deletion policies.
- Using the service in line with applicable legislation and organisational policies.

Technical Requirements

Client-Side Requirements

Customers are responsible for providing:

- Suitable devices for users
- Internet connectivity
- Internal user administration and governance
- Appropriate internal training and operational procedures

There is no need to install specialist hardware or install software on local devices.

No additional technical requirements apply beyond the client-side requirements described above.

Account Management and Ongoing Development

Account management is provided through our standard customer relationship and support arrangements. We manage ongoing development of the service centrally and updates and enhancements are delivered through controlled release processes and made available to customers as part of the managed service.

Development Lifecycle of the Solution

CasparGov is developed and maintained using a controlled development lifecycle.

Changes are subject to formal change management processes, including impact assessment, testing in non-production environments and approval prior to release. Security and privacy considerations form part of the development and change process.

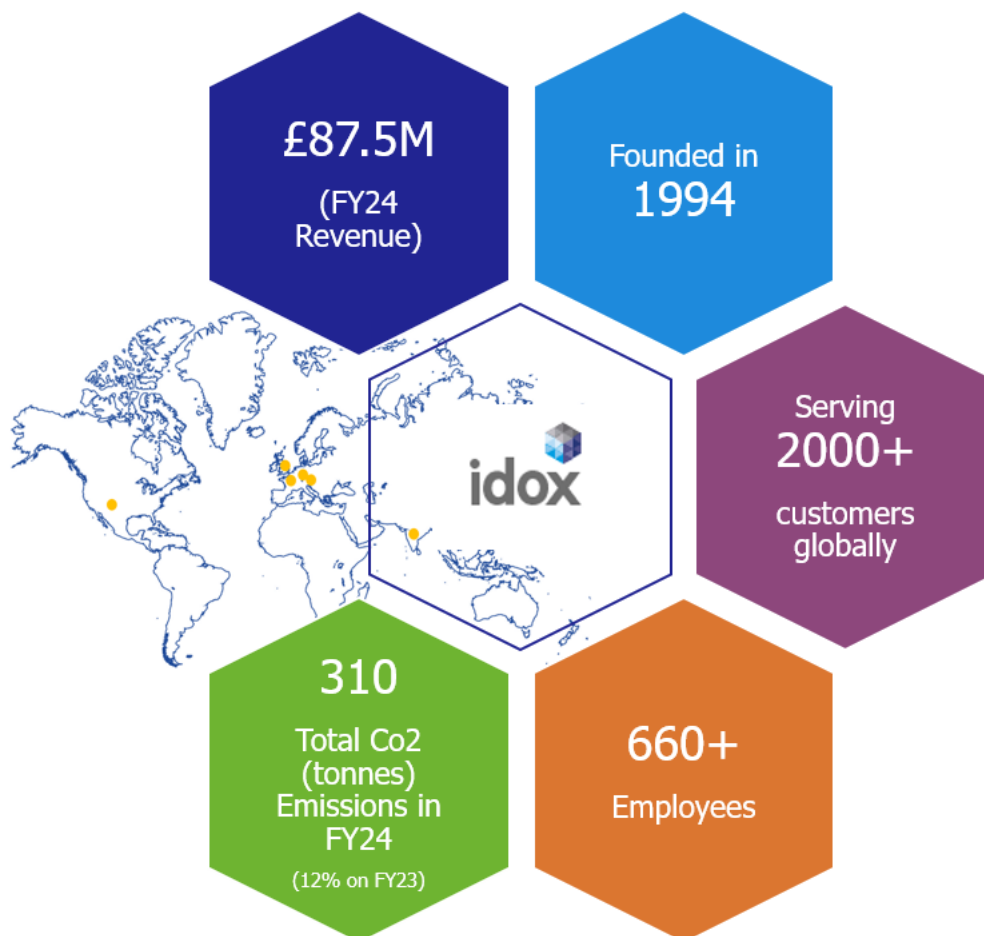
About Idox

As a UK based organisation with a long and enduring history supporting government in the UK and around the world, we design the smart digital solutions that help public sector organisations work better, stay compliant, and engage more effectively with citizens.

Our platforms are secure, scalable, and built to meet UK government standards. They support accessibility and strong data protection, following GDPR and ISO-certified processes. This means organisations can modernise services, optimise costs, and deliver better outcomes for their communities.

We make it easy for public sector teams to access our full range of services (cloud software, and support) through the Digital Marketplace. This streamlined approach saves time and removes the complexity of traditional procurement.

With a strong presence across the UK and over 650 colleagues, we are a trusted partner for digital transformation, bringing proven expertise, reliable technology, and a commitment to helping organisations achieve their goals. Whether it's improving efficiency, meeting regulatory requirements, or creating better experiences for citizens, we are here to empower you to *do more*.



About CasparGov

CasparGov provides functionality to support the management of cases and finances for adults who lack capacity or require support to manage their financial and personal affairs.

CasparGov provides functionality to support:

- Centralised client and case management.
- Client money management and reconciliation.
- Diary and task management.
- Recording of visits, notes and decisions.
- Management of assets such as property, vehicles and personal possessions.
- Fee calculation and charging.
- Workflow and legal process management.
- Reporting and statutory returns.
- Document and correspondence management.

Giving Back to Communities through Social Value

We are dedicated to running a business that helps customers *do more*, while creating a better world for everyone, our customers, our employees, and the environment around us.





In the summer of 2025, two of our colleagues used their paid volunteering day to support the North West area final of The Learning Partnership's 'Race to the Line' STEM programme. Local school children had been busy all year designing and building their racing cars and developing the STEM skills that will prepare them for the well-paid jobs of the future. Our colleagues were on hand to support the smooth running of the event and lend a hand to the students on this important day.

"We were really impressed to see the work that had been done, the children clearly loved the project and the final races proved highly competitive!"

Idox. Do more.

Here's how we help to make a positive impact:

- **Helping communities and the environment:** Our software makes government services better for people and the environment. Whether it is helping local authorities to plan and build towns and cities where people can thrive, providing the locations that the emergency services need to get to those in need faster or supporting the adaptive management of our conservation areas, Idox software products are making lives better throughout the UK, every day.
- **Investing locally:** We give back to local communities by supporting charities that are local to our customers with donations and access to funding opportunities to unlock investment where local people need it most.
- **Connecting our colleagues with causes that matter:** Every colleague at Idox is entitled to take a paid volunteering day each year to support local communities and charity projects that matter to them and their communities.

- **Protecting the environment:** We're already a naturally low emission business but we've committed to further reducing our carbon footprint, aiming to be carbon neutral by 2040. We cut down on energy use, limit travel, promote eco-friendly practices and have adopted the three scopes of the Greenhouse Gas Protocol (GHG) across our business. <https://www.idoxgroup.com/wp-content/uploads/Cabinet-Office-Carbon-Reduction-Plan-Template-Report.pdf>
- **Doing the right thing:** We believe in fairness and respect for everyone. Our workplaces are inclusive and safe, with fair pay and opportunities for growth and we prioritise diversity, employee well-being, and security in everything we do. Our employees benefit from our extensive range of employee benefits and family friendly working policies as well as leadership training and employee advocacy groups such as Idox Elevate, Pride@Idox, Neurodiversity@Idox, and Workplace Wellbeing.

Throughout our business we hold ourselves to a high standard. We are committed to ethical business practices, including a zero-tolerance approach to modern slavery throughout our supply chains and prompt payment in line with the Public Procurement Act 2023. Our systems and processes are certified to the highest standards including:



Case Studies

Case studies are available on request and are not included as part of this Service Definition.

Contact us

Jen Roberts – Head of Bids

Email: frameworks@idoxgroup.com

Telephone: 0333 011 1200

Copyright

Ideas, solutions, suggestions, hints and procedures from this document are the intellectual property of Idox plc and thus protected by copyright. They may not be reproduced, transmitted to third parties or used in any form for commercial purposes without the express permission of Idox Group.