

Insource Limited

Health Data Enterprise (HDE)

G-Cloud 15

Service Definition Document



Version: V2.0
January 2026



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Value Statement

For trusts and ICSs standardising data for reporting, planning and analytics: HDE automates ingestion and validation from multiple clinical systems into a Unified Data Layer (UDL), ready for statutory returns and local BI. It provides auditable, interoperable, scalable data foundations—improving data quality, compliance and operational efficiency across the system.

Social Value Statement

System efficiency: Unified Data Layer reduces duplication, enabling faster, more accurate reporting and analytics across trusts/ICSs.

Equity & insight: Standardised data helps identify inequalities and supports targeted interventions across populations.

Green delivery: Remote deployment and consolidated data processing contribute to lower energy use and travel emissions.

Governance: Compliance with NHS security and toolkit expectations supports safe handling of personal data.

Accountability: We will report social value progress and Net Zero actions in line with NHS contracts and PPN requirements.

Service Definition

Healthcare Data Enterprise (HDE) solution suite

Encompassing the rich functionality of Data Academy, Health Data Enterprise (HDE) is an enterprise-scale suite of data management solutions that helps solve critical data accuracy, consolidation and automation issues. HDE integrates any combination of PAS/EPR and clinical systems to collect, validate and consolidate data into a single version of the truth. It provides a single source of structured, unified data – free of the application layer – that gives organisations unfettered access to their fully validated data on which to base key clinical, operation and strategic decisions. HDE provides a powerful data platform on which to base data management projects within trusts, across Integrated Care Systems or nationally.

Data foundation for diverse healthcare environments

- A Unified Data Layer (UDL) from billions of data items
- Automated validation and reporting
- Underlying data foundation to PAS and clinical systems
- Out-of-the-box functionality for fast time to value



A Unified Data Layer (UDL) from billions of data items

HDE takes data from a huge range of sources in a wide variety of formats including specialty and diagnostic systems, central admin solutions such as PAS or EPRs, and local community or mental health systems... and integrates these billions of data items into a Unified Data Layer (UDL). This data is consolidated, validated, and standardised into a single version of the truth for use in all reporting and planning activities trust-wide, regionally, or nationally.

Automated validation and reporting

Insource, our partner's, and trust-based applications can take this unified data and extract invaluable insight, based on accurate near-real time, patient-level pathway data, to drive patient care and performance improvements. The UDL also forms the basis of all central and statutory returns reporting for accurate tracking of, amongst other things, both RTT and non RTT waiting lists and key CDS activity data for activity payments.

Underlying data foundation to PAS and clinical systems

Far more than a data warehouse, HDE is a data management platform that underpins all admin and clinical systems with automated data validation and consolidation. Through extensive rules engines, complex data handling and management, HDE ensures the standardisation of data throughout the enterprise. It can be configured to support all local SOPs or national requirements to meet any structured data processing needs or regulatory conformance.

Out-of-the-box functionality for fast time to value

Built entirely for healthcare, with over 20 years expertise, the HDE out-of-the-box functionality gives exceptional time-to-value. It delivers rapid individual site configurations and customisation to meet the most exacting requirements. HDE forms the basis of a range of Insource applications including Patient Pathway Plus, our waiting lists management solution, and our data quality, CDS reporting, capacity planning and analytics capabilities.

Unique data management technologies

Our full technology suite has been developed to meet the needs of a data-driven healthcare system. It ensures data unification, standardisation, and accessibility – despite the underlying systems infrastructure – so frontline staff can get access to the accurate data they need.

Data Academy provides the core data foundation on which our full solutions suite has been developed and Health Data Enterprise (HDE) shows the extent to which the platform can be expanded to meet emergent data management needs of today's NHS both locally and nationally.



Features

- Connects to multiple backend systems and popular PAS and EPRs
- Provides Single Version of the Truth, Unified Data Layer (UDL)
- UDL based on NHSDDS as base for separate application layer
- Development and Automation tools for data services and reporting
- Provides an offline environment for development and testing
- Management Console for data warehouse performance metrics
- Traces and Audits source and target data with full lineage
- Links and connectors to reporting and outcome packages
- Delivers patient level Pseudonymisation to NHS standards
- Using open development standards

Benefits

- Achieves Single Version of the Truth, Unified Data Layer (UDL)
- Delivers business, clinical reports and outcome packages from a UDL
- Delivers efficiency and productivity gains through extensive automation
- Enables automated, accurate delivery of statutory NHS/Social Service returns
- Assures data confidence and accuracy with a clear audit trail
- Assures successful self-service BI solutions and data warehouses
- Standardisation for collaboration across a wider healthcare economy
- Provides root cause analysis of business process issues
- Removes data complexity as a limitation to transformational improvement
- Assures information continuity throughout a period of system migration

About Insource Limited

Founded in 1999, Insource delivers operational and data management solutions to both NHS and private UK healthcare providers and addresses the data unification and data accessibility challenges facing providers globally. With over 20 years' expertise we currently work with most national NHS government bodies and over 60 NHS Trusts and Health Boards assisting with their data management, planning, and reporting challenges.



Strategically our UDL (Unified Data Layer), the result of many years' R&D, forms the foundation for trust-wide data management, Integrated Care System (ICS) insight and control, and partner applications development. Our core Health Data Enterprise (HDE) data management platform, which creates our application-independent UDL, brings data together from disparate systems to provide unified, standardised, single version of the truth for frontline intelligence and effective care delivery and reporting.

We believe that all operational healthcare data should be accessible, unified and useable at local, system and national level. With challenging targets, managers need to recover services quickly, but unfortunately, NHS teams are constantly on the back foot because of incomplete, unreliable, and out-of-date information. We aim to give NHS managers the accurate, near real-time data they need to turn things around. Our powerful data management platform unifies, standardises, and makes accessible operational data from across the service. It creates a single version of the truth, despite the disparate data formats, legacy infrastructure and changing system-wide architecture.

Our applications harness the power of this unified data to extract intelligence, and help you to make confident decisions, and streamline operational processes that improve healthcare delivery for the very best patient care.

Insource have an extensive suite of solutions that cover Data Management, Elective/Non-Elective/Cancer pathway management, Capacity and demand planning and scheduling and RTT and Cancer e-Learning.

Onboarding and Offboarding Support

Insource has been working in the UK for over 20 years, with over 60 NHS and other healthcare providers as customers throughout the UK. We have a vastly experienced UK team with decades of combined industry experience supporting customer solutions delivering care at hundreds of healthcare organisations. We combine our experience with a standard delivery approach, our best practice ITIL aligned project delivery methodology called The ISDM Methodology (Insource System Deployment and Maintenance) which is a combination of PRINCE2 processes, controls and governance with an Agile approach to Design, Configure and Deploy.

Implementation Approach

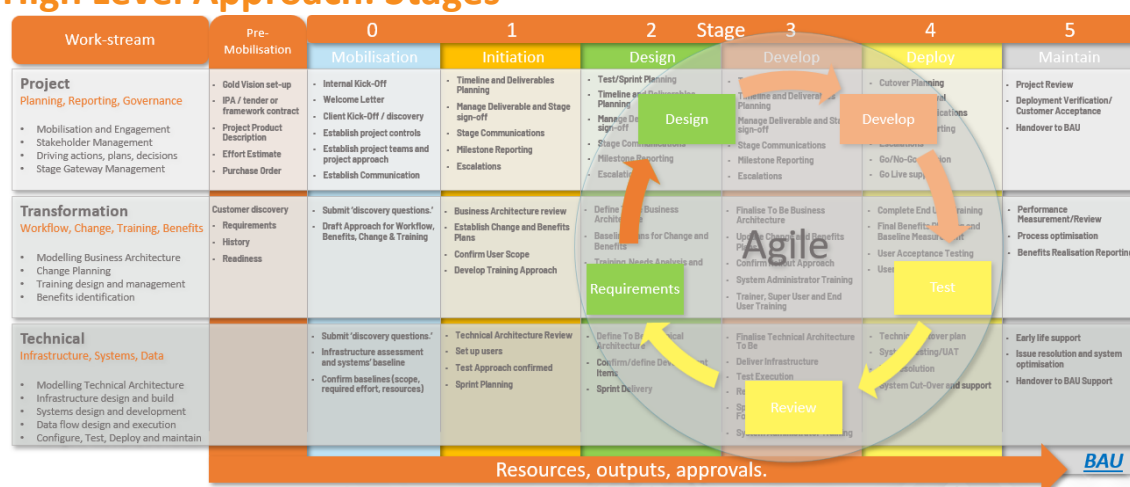
Due to the variable nature of customer projects, we do not provide a standard fee for implementation services, and therefore implementation costs are not included within the pricing document. An initial discovery phase or Scoping Exercise will be carried out to obtain information relating to customer



requirements. Information obtained during this phase will be used to agree and price all variable components.

The Insourc ISDM methodology supports a standardised approach to the delivery of projects with standard process, tasks, artefacts, resource roles, dependencies, and risks across each stage of the product lifecycle defined by the complexity of the project. The approach includes defined phases, tasks and resources to undertake appropriate design and delivery either in a traditional 'waterfall' approach or through an interactive or agile approach.

High Level Approach: Stages



Training

Training is included as an optional component of the deployment services costs and will be scoped and agreed as part of the Planning and Design phase of the agreed programme or project. Insourc works in partnership with its customers and can offer a range of training and materials to facilitate rapid adoption of the solution. All of Insourc's solutions are designed to be easy for staff to learn and use, supporting rapid uptake with minimal training.

Training is offered through:

- Logistix Portal - online resources providing detailed documentation including Wiki and knowledge base, product downloads, customer forum and query help line for support.
- Instructor-led - face to face training with an experienced Insourc trainer often at the customer site.
- Webinar - instructor-led training with the convenience of a virtual learning environment.



A 'Train the Trainer' approach is often recommended, whereby Insource provide the local team with the knowledge and skills necessary to establish an ongoing end user program independent of Insource resources.

Offboarding

Insource understands the importance of developing a contract exit strategy and plan, and as such, will work with the customer to develop an appropriate exit plan if one is required.

Support Service

Insource provides an industry-standard, ITIL-aligned support service that can be tailored to meet client needs. Our support services include four service levels, operating Monday to Friday, 09:00–17:00, excluding UK public and bank holidays, unless extended or out-of-hours support is specifically requested and agreed.

Standard Support

This level of support is designed for organisations with strong in-house capability to manage their Insource Data Management solution. Pre-requisites: At least two trained client users (HDE – Development & Management) or a minimum of two years live service with at least one year of internal support. Includes: Reactive support via online portal (FogBugz), advice, guidance and troubleshooting, diagnosis of build failures, fix and workaround guidance, notifications of required upgrades and new releases, and SLAs as per Standard Support. Provided on a fixed annual price, reactive support only.

Enhanced Standard Support

Includes all Standard Support services, plus pre-purchased Time & Materials for additional support activities. Includes: All Standard Support features, flexible call-off consultancy time, scheduled work at standard day rate, and urgent unscheduled requests at a premium rate. Ideal for organisations needing occasional expert input.

Standard Support Plus

Designed for organisations confident in day-to-day operation but requiring regular expert involvement. Includes: All Standard Support services, application administration (users, groups, organisations, workflows, lists), two scheduled configuration audits per year, managed upgrades across test and production environments, and remedial fixes following upgrades. Provided on a fixed annual price, combining reactive and proactive support.



Data as a Service (DaaS)

A fully managed service providing end-to-end operational management of the Insource data platform, designed for organisations that do not wish to manage the platform internally. Includes: Proactive monitoring of data, builds and performance, proactive maintenance and version upgrades, reactive fault resolution and user support, configuration, change management and enhancements, and support for new projects and service expansion. Ensures continuous availability, performance optimisation and data integrity.

Service Levels

Insource shall prioritise all support requests based on its reasonable assessment of the severity level of the problem reported according to the following table:

		Impact		
		High	Medium	Low
Urgency	High	1. Critical	2. Urgent	3. Routine
	Medium	2. Urgent	3. Routine	3. Routine
	Low	3. Routine	3. Routine	3. Routine

And respond to all support requests in accordance with the responses and response times specified in the table set out below:

Standard, Standard Support Plus and Enhanced Support



Severity level of Fault	Definition	Support Response Time	Target Resolution Time (business day)
1	Business Critical Failure: An error in, or failure of, the Insource Software or Products that: (a) materially impacts the operations of the Client's business or marketability of its service or product; (b) prevents necessary work from being done; or (c) disables major functions of the Insource Software or Products from being performed.	1 hour	1 day
2	System Defect with Workaround: (a) a critical error in the Insource Software or Products for which a work-around exists; or (b) a non-critical error in the Insource Software or Products that affects the operations of the Client's business or marketability of its service or product.	4 hours	2 days
3	Minor Error: An isolated or minor error in the Insource Software or Products that: (a) does not significantly affect Platform's functionality; (b) may disable only certain non-essential functions; or (c) does not materially impact the Client's business performance.	1 day	5 days

Data as a Service (DaaS)

Priority Level	Description	Support Response Time	Resolution Time (business day)
Priority 1 (P1): CRITICAL	• Lack of availability of an updated UDL ¹ • Inaccessible UDL	1 hour	1 day

¹ The fix time for “the lack of availability of an updated UDL” refers to the time taken to resolve the issues attributable to the Software Products and does not include issues which are attributable to the underlying Infrastructure. Also, does not guarantee an updated UDL within the fix period, the supplier will make best reasonable endeavors to make an updated UDL available within the SLA time period, otherwise the UDL will be updated within the next build cycle.



Priority Level	Description	Support Response Time	Resolution Time (business day)
Priority 2 (P2): URGENT	• Severe degradation in system performance affecting all users due to the failure of the Software Products • Connectivity available, but applications not functioning as expected i.e. HDE services. • Data integrity is compromised. i.e., partial data presented, or data is not refreshed as per agreed schedule • Data loading mechanism reports a failure • Custom business rules incorrectly defined • Logical data processing error	4 hour	2 days
Priority 3 (P3): ROUTINE	• Local to national coding mapping incident • Notification of Software Products updates • Requests for updates in user, group workflow and business unit changes • Request for an estimate of Software Product configuration change • Delivery of a two-day Software Product configuration change	1 day	5 days
Priority 4 (P4): SERVICE REQUEST	• Requests for Software Product updates • Requests for additional training • Requests for additional consultancy or new project • Requests for advice on local configuration • Delivery of a Software product configuration change which will require more than a two-day configuration as specified in the request for an estimate • Incidents/problems caused by items/reasons not supported by the Supplier under the terms of this Contract, including (but not limited to) third party software, network, infrastructure, Authority supplied hardware, etc.	3 days	Variable on reason for request 1 week to 2 months
Priority 5 (P5): PLANNING	• Planning Sessions	5 days	No fixed Resolution time. Arranged as available.



Commercial Approach

At Insource we recognise that all customers have different requirements, we work in partnership to ensure that we agree on a solution that meets your individual needs. Therefore, due to the variable nature of customer projects, an initial scoping exercise will be completed to obtain information relating to specific customer requirements. Information obtained during this phase will be used to agree and price all variable and optional components.

Ordering and Invoicing Process

The scope of deliverables will be agreed between the customer and Insource in accordance with specific customer requirements and detailed in the Order Form.

Insource will invoice the customer in accordance with agreed Milestones as per the contract. Payment of invoices will be subject to payment terms as detailed in the contract.

Payment terms

Insources standard payment terms are thirty (30) days from receipt of invoice or as per the terms in the contract.

Contract Termination

Contract termination is offered in accordance with standard terms and process detailed within the contract.

Technical Requirements

The technical requirements of the service will vary depending on the modules taken within the Insource solution and the scope of the individual customer project.

Patient Pathway Plus can be installed on new or existing server hardware. It can be implemented in any of the following configurations.

- Dedicated server
- Shared server
- Virtual Environment

The following server specifications will provide a typical acute trust or Health Board using Patient Pathway Plus with sufficient storage and processing capability when installed on a dedicated environment. These server specifications are available as a physical server or as a virtual image within virtual server environment.

Only one instance of Patient Pathway Plus is supported per server (whatever the configuration). Multiple instances on the same server are not possible.



The following recommended configurations are subject to initial investigation and are provided for guidance purposes only. Greater data volumes may require a higher specification infrastructure.

Physical Server

Component	Spec	Details
CPU	Quad Core Xeon Processors	
RAM	16GB RAM	
	3 x 600gb Hard Disk Drives configured with RAID 5 stripping	
	Partitioning Details	Drive 1 - Operating System 150 GB Drive 2 - Database Files (*.mdf) 0.5 TB Drive 3 - Database Logs (*.ldf) 0.5 TB Drive 4 - Temp DB/Master 0.5 TB

Virtual Server Image Specification

Component	Specification
CPU	1CPUs, 8 Total Cores
RAM	16GB RAM
Datastore	1.6TB, 4 logical drives; OS 150GB, 500GB each for Data, Logs, TempDB

Note that the size of the disk is dependent on the volume of source data included. During processing, the application may require up to 5 times the storage space of the imported data to cater for environments, transformations, cube production and all the other sophisticated data processing elements of Patient Pathway Plus.

Software

The following software needs to be installed and configured on the server to support the Data Academy® components of Patient Pathway Plus:

- Microsoft Windows Server 2019 or better
- Microsoft SQL Server 2016 64-bit (latest service pack) or SQL Server 2017/2019, Standard edition or better (All modules installed).
- Microsoft Internet Information Services (IIS) 6 (or later)
- Database Mail (included in SQL Server setup) – Required for email notifications only.
- Microsoft .NET 4



Please note that the system requirements given above are the minimum requirements for our products and for Microsoft SQL Server. Your overall requirements may be greater depending on the software installed.