

# Insource Limited

## PAS/ePR Migration - Business Continuity

G-Cloud 15

Service Definition Document



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## Value Statement

For NHS providers changing PAS/EPR without disrupting care or reporting: Our migration approach safeguards statutory reporting and operational intelligence from day one, combining early data quality improvement, parallel source validation, and full auditability—minimising risk and cost while protecting income and compliance throughout cutover.

## Social Value Statement

Business continuity: Zero-day continuity of statutory reporting protects public value and avoids costs and risks during digital change.

Economic opportunity: We engage NHS staff in discovery/UAT to build internal capability; partner with UK SMEs for specialist tasks.

Digital inclusion & skills: Structured knowledge transfer enables local analysts to sustain improved data quality post-migration.

Climate action: Remote-first delivery and re-use of existing server assets minimise environmental impacts.

Transparent measurement: Baseline and reporting of migration benefits (DQ fixes, continuity metrics, avoided breaches) as part of social value reporting.

## Service Definition

### Data Migration – clean data the life blood of any new system

System migrations are a marvellous opportunity to get your data right and improve operational processes. At Insource we not only offer full data cleansing pre-migration, to improve the quality of data held in the new system, but we also ensure complete operational and statutory reporting continuity throughout the migration and the bedding-in process, to give your staff time to get used to new procedures. In addition, we provide a wide range of services from performance analytics, data quality audits, and risk consultancy to new SOP setting and testing, to ensure your new system delivers enhanced business processes you expect.

Our extensive expertise covers legacy migrations for:

**PAS/EPR, Digital Pathology, Community, Mental Health and ICS systems.**

### Full data services for go-live success

- Pre-migration data cleansing
- 100% statutory reporting continuity
- Wide expertise in national systems
- Data and process consultancy for risk identification and avoidance
- Revision of existing SOPs for performance improvement



- HSCN Compliance for managed service – post go live

### **Pre-migration data cleansing**

Validating waiting list data and other operational data is essential if a new system is to deliver the expected improvement in outcomes. Broken pathways, 'lost to follow up' cases, missing patients and duplicate records all skew the delivery of effective care. We consolidate data from disparate source systems to provide a single source of truth for a clean start with your new system.

### **100% statutory reporting continuity**

With a track record of delivering 100% continuity success for all our migrations we ensure all statutory reporting and links to secondary systems continue uninterrupted during lengthy migrations. Our ability to contain data in a post-go-live environment also ensures that that data is full accessible and accurate throughout until staff get familiar with the new system.

### **Wide expertise in national systems**

Our expertise covers all the main PAS/EPR vendors and most Mental Health and Community systems so you can be fully confident that detailed processes are understood, and any issues can be diagnosed easily with our expert support to ensure a smooth transition.

### **Data and process consultancy for risk identification and avoidance**

Changing a system that has been embedded for many years throws up all manner of data issues both from historical use and outdated practices to implementing the new planned processes. Our data consultancy expertise can help in this journey and can support information teams as they address key risk areas.

### **Revision of existing SOPs for performance improvement**

New brushes hope to sweep clean – and reviewing, writing, testing, and updating old SOPs to go along with the new implementation is critical if new results are to be expected. With over 30 years NHS data expertise we can help implement new procedures to streamline care.

### **HSCN Compliance for managed service – post go live**

Having met the high standards of HSCN (Health and Social Care Network) compliance we can also offer remote services to give you access to the most skilled staff during the transition or, we can deliver ongoing data quality as a managed service post-go-live to ensure your data stays clean.



## NHS Recruitment and Staffing

Skilled staff with an in-depth knowledge of data are in short supply across the NHS. We would be happy to provision skilled data and IM&T consultancy staff for wider data quality and process audit projects with immediate effect. Some of the roles we can fulfil on three – six-month contracts working directly for our clients are:

- Head of Information cover
- Data quality experts
- Experienced SOP staff
- Process change and redesign consultants
- Extra 'Floor walking' resource for Go Lives

## Our full data quality services

Our data quality services encompass the validation of your entire waiting lists, and if required full automation of waiting list reporting post-project, as well as support for complex data migrations from clinical or diagnostic legacy systems that ensure secondary reporting continuity and complete operational management throughout. Our interim and temporary skilled manpower can also be deployed for immediate response to all data management challenges.

## Features

- The Insource Data Systems Migration Solution delivers a strategic data platform that will support.
  - Future business continuity in the event of a further subsequent change in PAS/EPR
  - Future BI/Reporting requirements
  - Expansion in data support
  - Data Quality Management
  - Long term potential change in trust operations
  - Cohesive data connections to other organisation wide peripheral systems
- Provides the ability to begin the process of assessing the business continuity requirements early in the migration project.
- Provides support for early indication of potential DQ issues.
- Supports DQ initiatives and provides the ability to monitor their progress.
- Having the Insource Data Platform as an integral part of the migration process enables the ability to add migration assistance applications such as
- RTT & Non-RTT Pathway & Waiting List Management / Validation



## Benefits

- All critical National Reporting is available from Day 1 of go live, which enables organisations to meet their national obligations, reducing the risk of potential penalties.
- The Insource Data Systems Migration Solution ensure the business continuity of.
  - Critical and non-critical systems currently dependant on the incumbent system
  - Production of statutory and non-statutory reporting which will include (but naturally not limited to)
    - PTLs, National Daily PTLs CDS, ECDS, MDS, FDF
  - Internal information reporting
  - Business Intelligence
- By being able to undertake early assessment of business continuity needs, greater board assurance is achieved.
- Providing early assessment of potential DQ issues, enables the trust to implement early interventions mitigating potential issues post go live.
- By providing support for monitoring DQ initiatives, trusts are ensured of DQ issues correction progress avoiding costly last minute additional intervention.
- Having access to access RTT & Non-RTT Pathway Validation provides board assurance of waiting list management pre and post 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 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.

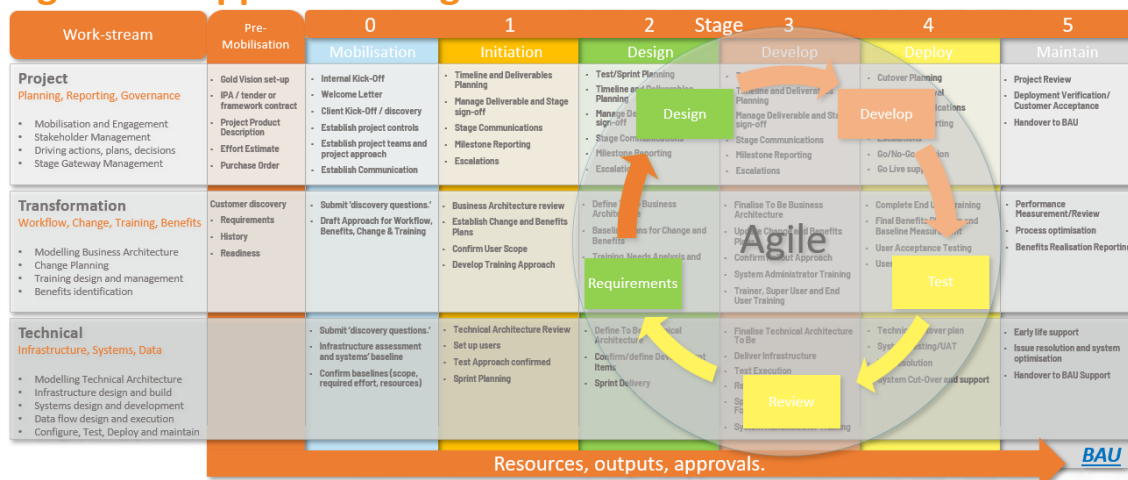
### **Implementation Approach**

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 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. Insource works in partnership with its customers and can offer a range of training and materials to facilitate rapid adoption of the solution. All of Insource'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 Insource 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 provides 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 of 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                       | <b>Business Critical Failure:</b> An error in, or failure of, the Insource Software or Products that:<br><br>(a) materially impacts the operations of the Client's business or marketability of its service or product;<br><br>(b) prevents necessary work from being done; or<br><br>(c) disables major functions of the Insource Software or Products from being performed. | 1 hour                | 1 day                                 |
| 2                       | <b>System Defect with Workaround:</b><br><br>(a) a critical error in the Insource Software or Products for which a work-around exists; or<br><br>(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                       | <b>Minor Error:</b><br><br>An isolated or minor error in the Insource Software or Products that:<br><br>(a) does not significantly affect Platform's functionality;<br><br>(b) may disable only certain non-essential functions; or<br><br>(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):<br>CRITICAL        | <ul style="list-style-type: none"><li>• Lack of availability of an updated UDL <sup>1</sup></li><li>• Inaccessible UDL</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                   | 1 hour                | 1 day                                                    |
| Priority 2 (P2):<br>URGENT          | <ul style="list-style-type: none"><li>• Severe degradation in system performance affecting all users due to the failure of the Software Products</li><li>• Connectivity available, but applications not functioning as expected i.e. HDE services.</li><li>• Data integrity is compromised. i.e., partial data presented, or data is not refreshed as per agreed schedule</li><li>• Data loading mechanism reports a failure</li><li>• Custom business rules incorrectly defined</li><li>• Logical data processing error</li></ul> | 4 hour                | 2 days                                                   |
| Priority 3 (P3):<br>ROUTINE         | <ul style="list-style-type: none"><li>• Local to national coding mapping incident</li><li>• Notification of Software Products updates</li><li>• Requests for updates in user, group workflow and business unit changes</li><li>• Request for an estimate of Software Product configuration change</li><li>• Delivery of a two-day Software Product configuration change</li></ul>                                                                                                                                                  | 1 day                 | 5 days                                                   |
| Priority 4 (P4):<br>SERVICE REQUEST | <ul style="list-style-type: none"><li>• Requests for Software Product updates</li><li>• Requests for additional training</li><li>• Requests for additional consultancy or new project</li><li>• Requests for advice on local configuration</li><li>• Delivery of a Software product configuration change which will require more than a two-day configuration as specified in the request for an estimate</li></ul>                                                                                                                | 3 days                | Variable on reason for request<br><br>1 week to 2 months |

<sup>1</sup> 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)                   |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|--------------------------------------------------|
|                              | <ul style="list-style-type: none"><li>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.</li></ul> |                       |                                                  |
| Priority 5 (P5):<br>PLANNING | <ul style="list-style-type: none"><li>Planning Sessions</li></ul>                                                                                                                                                                                                          | 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.