

Insource Limited

Contracting and Commissioning Data Management Platform

G-Cloud 15

Service Definition Document



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Value Statement

For finance and information teams who need accurate attribution and income assurance:

The Contracting & Commissioning application delivers transparent commissioner assignment, HRG/SCG integration and SLAM interfacing, eliminating manual rework. It strengthens PbR compliance, reduces errors, and provides end-to-end audit trails—so trusts can trust their numbers and defend their income.

Social Value Statement

Income assurance: Accurate commissioner assignment strengthens trust finances and protects resources for frontline care.

Fairness & transparency: Full audit trails and PbR controls reduce disputes and improve accountability.

Local capability: Agile co-design sprints with finance and information teams upskill staff and reduce consultancy dependency.

Environmental benefits: Digital workflows replace paper processes and unnecessary in-person reviews, reducing waste and travel.

Reporting: Social value KPIs (e.g., reduced manual rework, quicker reconciliation) can be captured and shared under governance.

Service Definition

Insourc **Contracting and Commissioning** provides NHS organisations with an enterprise-grade platform which

- Consolidates and manage the complex data required for contractual, financial, and commissioning oversight.
- It transforms raw activity data into a unified, reconciled, and analytics-ready dataset
- Incorporates HRG/SCG Grouping into activity data, including management and application of Current, Road-test, and Reference cost groupers, in addition to the application of historic groupers
- Applies the NHS Commissioning assignment model to activity
- Allows Commissioner override through rules based definitions of contract line assignment
- Provides easy management of complex contract, contract line, and line assignment rules
- Enables subsequent manual overrides of contract line assignment



- Produces CDS/ECDS returns automatically and semi-automatically as required
- Provides definable interfacing to trust SLAM applications

All of which enables accurate modelling, forecasting, reporting, and assurance.

Unified Data Ingestion and Consolidation

The service is capable of the ingestion of multiple data streams as needed from operational systems, and third-party providers. Capabilities include:

- Automated, repeatable ingestion of provider activity feeds
- Detection of data errors, missing fields, or inconsistencies
- Support for multi provider, multi organisation environments
- Application of single or multiple HRG and SCG groupers
- Activity contract line and commissioner assignment, based on both standard and local rules
- Reconciliation of activity

Standards Driven Validation and Reconciliation

To ensure accuracy and reduce contract disputes, the platform applies:

- NHS activity standards (SUS, SLAM, CDS, & ECDS)
- Application of Trust data validation rules
- Application of the NHS Commissioner assignment model
- Additional rules-based application of commissioner/contract assignment
- Consistent methodologies for counting, costing, and tariff application

Data Lineage, Governance, and Auditability

Commissioning and contracting rely on transparent, auditable data. The service provides:

- Full lineage from source submission to final reported outputs
- Version-controlled rulesets aligned to contractual and national guidance
- Auditable data quality and reconciliation logs
- Governance aligned with NHS Data Security and Protection Toolkit



Creation of the Unified Data Layer (UDL)

The Contracting and Commissioning UDL supports all activity, pathway, costing and performance datasets in a single trusted structure. It enables:

- A consistent, reconciled view of activity and cost across providers
- Near real-time assurance on performance, waiting times, and activity trends
- Capability of ICS-wide analytics linking commissioning, operational, and financial domains

Analytics Ready Outputs and Reporting Integration

The platform delivers curated datasets for commissioning analytics:

- Power BI integration
- Contract monitoring and performance dashboards
- Open data access for external BI tools

Operational Workflow and Performance Management

The system supports commissioning teams through:

- Monitoring contract KPIs, activity trends, and compliance
- Automating exception reporting and threshold alerts
- Highlighting underperformance, bottlenecks, and data quality issues
- Providing evidence to support negotiations, service redesign, and transformation
- Client defined Contract management and definition of rules-based contract line assignment
- Manual contract line assignment override
- Management and application of HRG/SCG groupers, including Road-Test, reference cost, and historic or novel groupers

Extensible Architecture for Integrated Commissioning

The platform supports commissioning across multiple domains:

- Acute, outpatient, diagnostics, Inpatient, and Emergency Department.
- System-wide activity modelling.
- Localisation of data flows ensures conformity with local SOPs and rules



Features

- Automated ingestion of provider activity and performance data.
- Robust reconciliation and validation processes.
- Unified activity, costing, and performance datasets.
- Power BI ready curated data structures.
- Full data lineage and audit trail.
- Support for national accounting and costing standards.
- Exception reporting and contract performance alerts.
- Secure, role-based access controls.
- Open data access for commissioning or finance systems.
- User defined contracts and contract management
- User defined contract line assignment rules

Benefits

- A single reconciled source of truth for contracting and commissioning.
- Reduced disputes through transparent validation and audit trails.
- Faster, more accurate contract monitoring.
- Improved forecasting and financial planning.
- Enhanced ICS-wide collaboration through shared intelligence.
- Streamlined workflows and reduced manual reconciliation.
- Support for evidence-led decision-making.

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

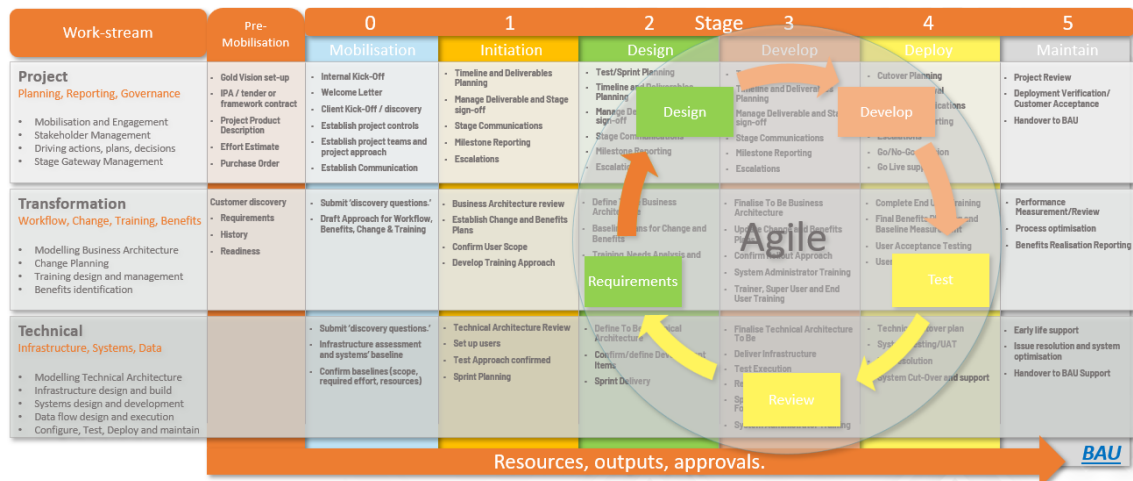
Due to the variable nature of customer projects, we do not provide a standard fee for implementation services, and therefore implementation costs are not included within the pricing document. An initial discovery phase or Scoping Exercise will be carried out to obtain information relating to customer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

The Insource 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 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 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.

Service Support

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)
1 (P1):	Critical (a) Lack of availability of an updated UDL ¹ (b) 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)
2 (P2):	Urgent (a) Severe degradation in system performance affecting all users due to the failure of the Software Products (b) Connectivity available, but applications not functioning as expected i.e. HDE services. (c) Data integrity is compromised. i.e., partial data presented, or data is not refreshed as per agreed schedule (d) Data loading mechanism reports a failure (e) Custom business rules incorrectly defined (f) Logical data processing error	4 hour	2 days
3 (P3):	Routine (a) Local to national coding mapping incident (b) Notification of Software Products updates (c) Requests for updates in user, group workflow and business unit changes (d) Request for an estimate of Software Product configuration change (e) Delivery of a two-day Software Product configuration change	1 day	5 days
4 (P4):	Service Request (a) Requests for Software Product updates (b) Requests for additional training (c) Requests for additional consultancy or new project (d) Requests for advice on local configuration (e) Delivery of a Software product configuration change which will require more than a two-day configuration as specified in the request for an estimate (f) 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 Level	Description	Support Response Time	Resolution Time (business day)
5 (P5):	Planning (a) 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.

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 dependent on a number of variables.

- The modules implemented,
- The size of the trust and hence the volume of data to be included,
- The scope of the implementation.

The service can be installed on new or existing server hardware or deployed to a cloud hosted virtual machine with the equivalent specification.



The following server specifications will provide a typical acute trust or Health Board using the service with sufficient storage and processing capability.

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

Physical Server

Component	Spec	Details
CPU	8 Processor cores	
RAM	64GB RAM	
	3 x 1TB Storage Drives (SSD)	
	Partitioning Details	Drive 1 - Operating System 150 GB Drive 2 - Database Files (*.mdf) 950 GB Drive 3 - Database Logs (*.ldf) 950 GB Drive 4 - Temp DB/Master 950 GB

Software

The following software must be installed and configured on the server to support the Data Academy® components (Supporting Software) of the service :

- Microsoft Windows Server 2019 or better
- Microsoft SQL Server 2019 64-bit (latest service pack) Standard edition or better (All modules installed, full config pre-requisites on request).
- 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.