

# Insource Limited

## Patient Pathway Plus (PP+)

### Pathway Management Solution

G-Cloud 15  
Service Definition Document





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## Value Statement

For NHS organisations accelerating elective recovery:

PP+ provides a single version of truth for RTT/non-RTT, automates PTL production, and surfaces risk early. It replaces spreadsheets with governed, auditable data and proactive workflows—freeing staff time, reducing errors, and helping services hit recovery trajectories.

## Social Value Statement

Patient outcomes: Creating a single source of truth reduces errors and lost pathways, improving elective access and patient safety.

Workforce productivity: Automation replaces spreadsheets, freeing staff time for care, and building analytics capability in local teams.

Inclusive services: Role-based views support diverse user groups; dashboards can spotlight inequalities for targeted improvement.

Net Zero alignment: Remote delivery and reduced unnecessary meetings/travel support carbon reduction.

Social value assurance: We will work with you to identify, implement and evidence social value opportunities.

## Service Definition

### Boost elective care recovery with accurate waiting list management.

Delivering daily, validated data for both RTT and non RTT waiting lists, our patient pathway management solution, **Patient Pathway Plus**, eliminates the need for spreadsheets and manual reports. It automates PTL reporting and enables healthcare organisations to confidently manage all elective care pathways, plan their recovery, spot bottlenecks, identify long-wait cancer cases and other clinical priorities, and ensures no patients are lost in the system. The **Patient Pathway Plus (PP+)** core data engine is foundational to our full suite of elective care solutions and provides accurate patient pathway data for greater trust-wide insight and control.

### Single version of the truth for all elective care management

PP+ consolidates data from disparate healthcare systems to provide a single version of the truth – standardised against NHS data dictionary formats – for use in all elective care management and reporting.

### Ensure RTT and Non RTT data accuracy

Ensuring data is validated through data automation and a complex set of rules-based data validation processes, PP+ eliminates spreadsheets and shows the precise status of RTT and non RTT electives waiting for treatment at any



point in time.

### **Automate PTL reporting and reduce manpower**

Automated data quality checks – up to 1 million/day – ensure complete data integrity so PTL reporting is streamlined and highly accurate. Large numbers of data validators are no longer necessary and can be redeployed to vital services

### **Spot bottlenecks, breaches, and long-waits**

With a daily, consolidated data source, hospitals can now easily identify bottlenecks in the pathways, whether in diagnostic services or manpower... and can spot breaches and long-waits. PP+ enables informed decision-making and helps avoid potential patient harm.

### **Accurate foundation for efficient capacity planning**

Validated data on which to base deployment of stretched resources is vital. PP+ shows the full scale of the problem – volumes, bottlenecks, clinical priorities – and allows the Board to plan capacity and redeploy services against greatest need.

### **Data confidence for trust-wide insight and control**

PP+ is an interactive, evidence-based data source that can incorporate all local rules and business configuration policies. It provides Board assurance and enables hospitals to reduce resource wastage and accurately plan their recovery.

## **Features**

- Connects to any PAS and EPR system
- True end to end accurately linked elective pathways including RTT/Non-RTT
- Pathways automatically compiled and validated against local and national rules
- Provides Single Version of the Truth, Unified Data Layer (UDL)
- Digital platform for management of all elective pathways
- Automatically highlights potential data quality issues in pathways
- Assures data confidence and accuracy with a clear audit trail
- Automatic production of statutory reporting
- Standardisation for collaboration across a wider healthcare economy
- Patient pathway and workflow analytics



## Benefits

- Single version of the truth for all elective care management
- Eliminate spreadsheets and ensure waiting list data accuracy
- Automate PTL reporting and reduce data validation manpower needed
- Spot clinical priorities, long-waits and identify bottlenecks
- Accurate foundation for efficient resource utilisation, capacity planning, AI
- Delivers efficiency and productivity gains through extensive automation
- Address bottlenecks and inefficiencies across the service
- Avoid inequalities in patient and staff experiences
- Make effective decisions with high quality timely data
- Extensive pre-built configurations from 20 years experience

## 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.

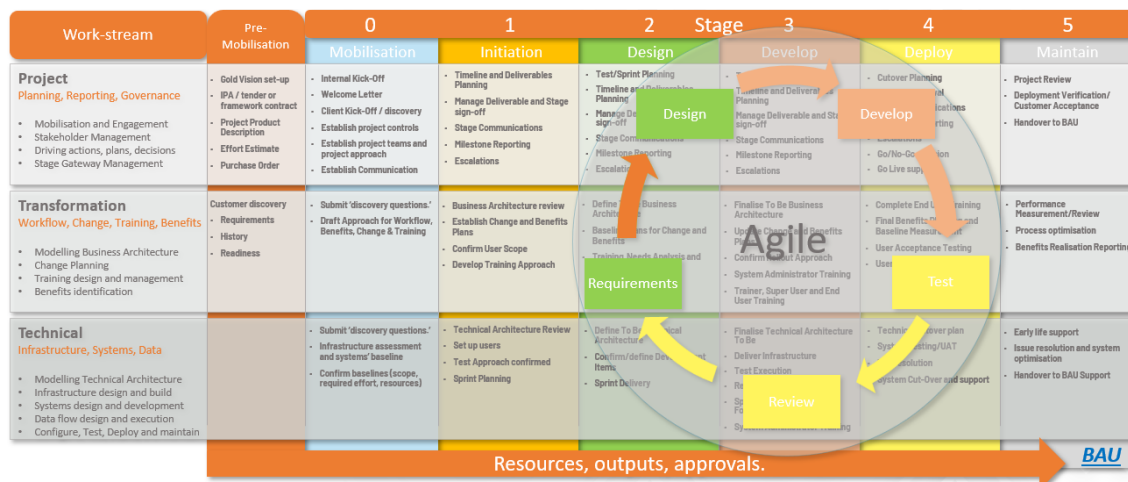
## **Implementation Approach**

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'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 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>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.



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

## Virtual Server Image Specification

| Component        | Specification                                                        |
|------------------|----------------------------------------------------------------------|
| <b>CPU</b>       | 1CPUs, 8 Total Cores                                                 |
| <b>RAM</b>       | 16GB RAM                                                             |
| <b>Datastore</b> | 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.