

Insource Limited

Gooroo Planner

G-Cloud 15

Service Definition Document



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Value Statement

For NHS operational leaders optimising capacity and reducing waits week-by-week:

Gooroo Planner models demand, capacity and waiting times at patient level, enabling scenario testing and actionable plans that balance beds, theatres and clinics. Integrated with the UDL, it turns planning into a live operational utility—improving performance and resource use.

Social Value Statement

Patient benefit: Week-by-week modelling reduces long waits, improving timely access to diagnostics and treatment.

Workforce wellbeing: Clear, realistic plans reduce firefighting and overtime pressures, improving staff experience.

Integrated planning: Shared scenarios across partners support collaboration and reduce unwarranted variation at system level.

Environmental impact: Better capacity planning cuts unnecessary activity and travel, supporting greener operations.

Impact reporting: We will work with you to evidence benefits (e.g., waiting-time reductions, plan-vs-actual) as part of social value reporting.

Service Definition

Gooroo Planner is one solution within a comprehensive elective recovery suite of products.

Gooroo Planner is powerful online planning software designed specifically for the NHS.

With managed setup and easy automation, you can make up to date planning a regular part of your performance management. Compelling visual analyses bring planning, capacity, and waiting lists to life, and built in collaboration brings people together.

The automated data flows for Gooroo Planner start with the NHS's own data systems. Insource's Health Data Enterprise (HDE) software connects to the NHS's systems, and after a long and meticulous sequence of transformations and localisations it creates a Unified Data Layer (UDL). The UDL provides standardised data for applications such as Gooroo Planner. The results of Gooroo Planner's modelling are returned to the UDL for onward use (such as "plan vs. actual" comparisons in business intelligence).



Features

- Automated planning of every hospital service in a single model.
- Plans along clinical pathways: from simple two-stage pathways to complex branched and cancer pathways.
- Choice of projection modelling (where the future is based on an average of the past) or advanced forecasting (reflecting recent changes in demand thresholds and performance).
- How to optimise the whole hospital, with options for constant beds and theatres through the seasons, while achieving waiting times targets every week of the year.
- Patient-by-patient simulation of waiting times, clearly showing the effects of clinical priorities, removals and other disruptions, as well as patient scheduling tactics and the imbalance between activity and demand.

Benefits

- Plans the whole hospital in one go: including elective, non-elective, outpatient, and diagnostic services; along clinical pathways; month by month, week by week, and patient by patient; down to any level of detail your data can handle e.g. subspecialty level
- Automated via Insource's Unified Data Layer, for regularly refreshed planning; detailed planning profiles are returned for integration into local business intelligence, performance management and tracking systems, and comparison against actuals
- Provides clear visibility for senior and operational managers about future recurring and non-recurring capacity needs, editable forecast profiles for capacity and elective waiting times, editable scenarios for performance improvement, and how plans should be adapted in light of events
- Shows managers how to adjust activity and capacity at medium range, reducing the need for short-term firefighting or extra capacity at high marginal cost
- Suitable for both long range strategic / annual planning and short-range tactical / operational planning

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 organisation-wide data management, Integrated Care System (ICS) / Health Board 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 view 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, demand & capacity 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.

Training

HDE

The data feeds for Gooroo Planner are automated via Insource's HDE product. Training on HDE 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 provide the local team with the knowledge and skills necessary to establish an ongoing end user program independent of Insource resources.

Gooroo Planner

Gooroo Planner comes with inclusive, unlimited, remote technical support – supporting customers to use Gooroo Planner themselves. Broader education



and training on the principles of demand & capacity planning and waiting time management are provided via comprehensive, inclusive video and documentation. Optional expert support is also available at daily rates for wider education and training, transformation, and interpretation and implementation workshops with departmental managers and clinicians.

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)
Priority 1 (P1): CRITICAL	• Lack of availability of an updated UDL ¹ • Inaccessible UDL	1 hour	1 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.	4 hour	2 days

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)
	• 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		
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, so 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

Insource's 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

HDE

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. This will often be a standard initial implementation that creates sufficient data in the UDL to feed Gooroo Planner for the most common use cases. There is the option of choosing either on-premise or cloud deployment of HDE.

Gooroo Planner

The Gooroo Planner application runs separately from HDE on a dedicated server in a secure Tier III data centre. This service is inclusive in the pricing of Gooroo Planner.