

Service Definition Document

Theseus: Referrals Management

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About Cyber Media

Cyber Media is a health tech company specialising in digital case management and engagement solutions for health and wellbeing and addiction services. Through our cloud-based Theseus platform, we help councils, the NHS and service providers empower teams to manage caseloads and referrals with confidence, support positive citizen engagement, and enable data-driven planning and meaningful outcome measurement across a wide range of interventions.

Over the last two decades, Cyber Media has become a leading provider of case management solutions and today supports over 200 organisations, with over 1,000,000 lives improved using our solutions. Cyber Media is part of the Mayden Group, strengthening our shared mission to deliver high quality, sustainable, efficient and cost-effective digital models of healthcare.

Theseus supports case management and referral networks for health and wellbeing services, including addictions, smoking cessation, weight management, diabetes, physical activity, exercise on referral and social prescribing.

About Theseus

Theseus is a proven platform that is the result of over 20 years' development and experience in the health and wellbeing sector. Theseus development and implementations are governed by the following certifications / compliance arrangements:

- An ISO 27001:2022 Information Security Management System (ISMS) certified by BSI
- Cyber Essentials Plus certified by Claranet
- A Clinical Safety Management System compliant with DCB0129
- An ISO 9001:2015 Quality Management System (QMS) certified by BSI
- Meeting the latest NHS DSPT standards

Access and interfacing with patient / client records is done in accord with consent, clinical safety, data protection and information security.

Theseus is used by organisations nationwide, including within the NHS, within District, Metropolitan, City and County Councils and within large partner provider networks.

Theseus is flexible supporting single service or multi-service integrated care systems managing a range of wellbeing interventions.

Theseus is readily scalable and supports evolving public health service delivery models without extensive bespoke reconfiguration. Theseus models and modules can be combined to provide an integrated health and wellbeing management solution.

We call this the 'Theseus Ecosystem', represented by the diagram overleaf.

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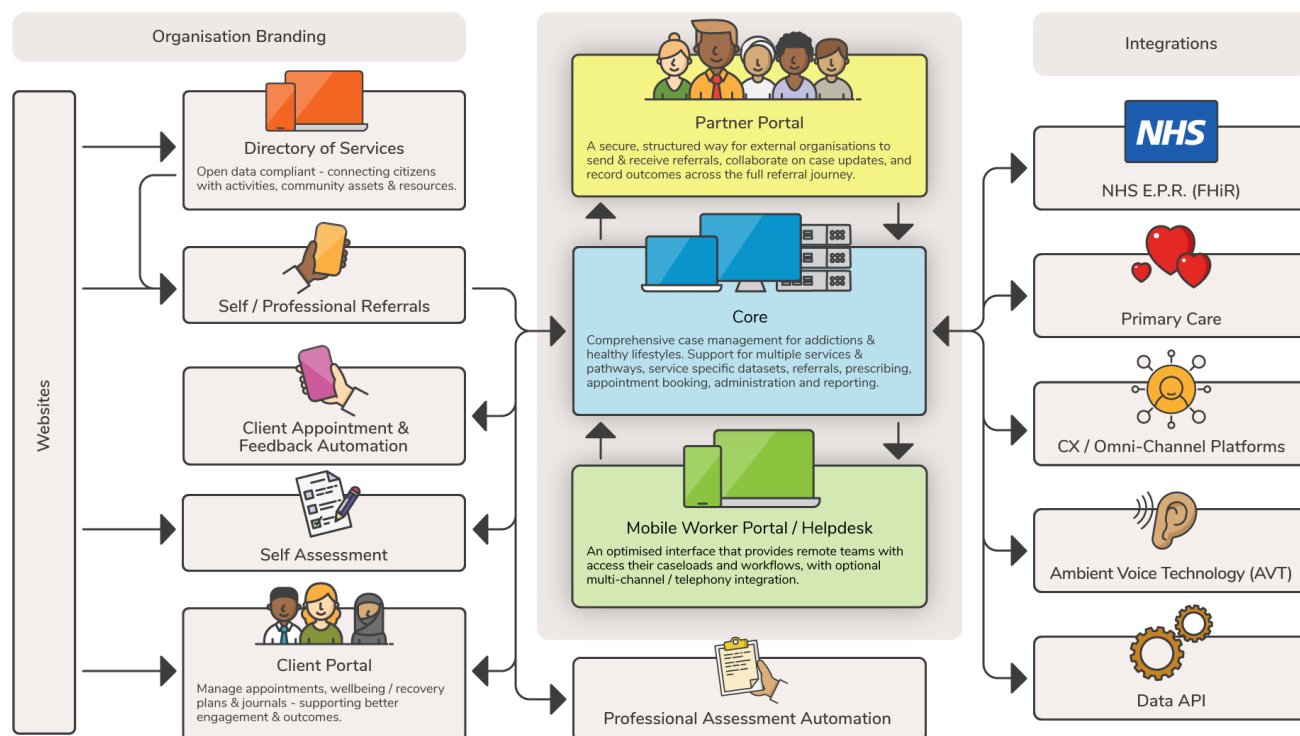


Diagram 1: Theseus Ecosystem Illustration

Theseus Models

A range of standard Theseus 'models' are available through G-Cloud, including:

- Ambient Voice Technology Case Management
- Build Your Own Case Management – for organisations wishing to configure their own instance of Theseus to manage a service themselves with appropriate online training and support provided
- Diabetes
- Directory of Services
- Drug and Alcohol
- Exercise Referral
- Gambling Harms
- Healthy Weight
- Integrated Care System Management
- Integrated Health and Wellbeing - for multi-service integrated care systems and local authority public health teams delivering multiple interventions
- Physical Activity
- Referrals Management
- Social Prescribing
- Single Service Case Management – for organisations wishing to use Theseus to manage a service that does not fall under specific Theseus models on G-Cloud can choose this model as a starting point
- Stop Smoking
- Wellbeing Self-Help

The functionality included with Theseus models can be readily extended through the deployment of additional Theseus modules, described overleaf.

Theseus Modules

Theseus 'modules' are available to provide additional functionality to Theseus models. Some models of Theseus may include one or more Theseus modules as standard, and others may be taken as optional additions.

Please see **Appendix A: Optional Additions** (included at the end of this document) for a summary of what is included and optional for this model of Theseus.

Theseus modules are categorised into three groups to reflect the level of additional functionality and the benefit they bring to your service. Pricing for each module group is identified in the pricing document for this Theseus model.

A product roadmap is maintained for Theseus and new modules are proactively developed to ensure product features continue to reflect innovation and best practice.

Group 1 Modules

Group 1 comprises simple modules requiring minimal configuration that can be deployed within weeks. There is no deployment cost associated with Group 1 Modules.

Appointment Self-Booking

Enables patients / clients to book appointments online from any device, following an automated email prompt. Please note the Diary and Appointment System Booking Module (available under Group 2 Modules) is a prerequisite of the Appointment Self-Booking Module. Priced per workflow.

Certificate Access

For circumstances where an organisation wishes to use devices not connected via an organisation network, or where IP whitelisting is not possible.

Email Reminders and Notifications

Keep patients / clients engaged, reduce missed appointments, and simplify communication with automated emails.

Entra ID Module (Azure Active Directory)

Enables single sign-on for users using their Microsoft Azure credentials, e.g. enables users to authenticate with Theseus using the same credentials as their workstation (if this is managed using Microsoft Azure). Priced for single Entra ID tenant.

Entra ID (Azure) 365 Calendar

Enables Theseus to create, update and cancel appointments directly within your Outlook/Exchange online calendars. Please note the Diary and Appointment System Booking Module (available under Group 2 Modules) is a prerequisite of this module.

Group 2 Modules

Group 2 Modules are designed to provide additional functionality to improve service delivery and support the expansion of your service(s).

Group 2 Modules require a small project to configure and deploy which is facilitated through the purchase of **'Theseus Support Services'** offered under **G-Cloud 15 Lot 3**.

Diary and Booking System

Coordinate appointments, events, and group sessions across services with real-time availability, configurable working patterns, and zero double-booking.

Engagement Website

For increasing patient / client engagement with health and wellbeing initiatives and facilitating ease of access to self-help resources. This module can be integrated with the Service Directory, Self-Assessment and Referral modules (if taken).

Flexible Form Builder

Empower your team to create, manage, and evolve your service data collection. Build unlimited multi-section forms and letters in Theseus with our intuitive Flexible Form Builder.

Outcome Form Builder

Transform complex assessments into clear, visual insights. Create unlimited scored assessments, track progress over time, and present results in powerful charts directly within Theseus.

Partner Assessments

Automates data collection from partners making it quick and easy for partners / professionals to complete assessments (such as Cardiac Assessments) on any device, following an email prompt. Priced per workflow.

Post Treatment Follow-ups

Automates patient / client feedback collection post discharge to record long term outcomes and service success. Follow-ups are fully branded and configurable, and results write back directly into Theseus.

Pre and Post Appointment Assessment Forms

Automatically prompt patients / clients to self-complete assessment forms before and after appointments. Assessments are fully branded and configurable, and results write back directly into Theseus.

Referrals

Enables self-referrals and unauthenticated professional referrals into Theseus case management. Priced per form.

Satisfaction Surveys

Automates patient / client feedback collection, making it quick and easy for patients / clients to complete surveys following an email prompt. Surveys are fully branded and configurable, and results write back directly into Theseus.

Service Directory

A versatile directory of services system to connect citizens with activities, community assets and resources in their locality, and empower partners to publish their offer on a publicly accessible website. Priced per 500 directory records.

Group 3 Modules

Group 3 contains powerful modules designed to transform service delivery and deliver significant service efficiencies and / or workflow improvements.

Group 3 Modules require a small project to configure and deploy which is facilitated through the purchase of **'Theseus Support Services'** offered under **G-Cloud 15 Lot 3**.

Ambient Voice Technology Enablement

Supports transcription of letters, generation of clinical coding and automation of follow up orders. Excludes third party costs.

Client Portal

Enables patients / clients to engage and take ownership of their health and wellbeing. The Client Portal is accessible on any device and provides patient / client access to features including care plans, journals and appointments. Priced per workflow.

Data API

Enables secure, real-time access to key data – such as patient / client records, referrals, service outcomes, and case notes – without needing direct access to the core platform. Priced per API tenant.

EMIS Integration

The module enables GPs to send referrals into your service from their EMIS environment and, if desired, for outcomes to be written back into the EMIS patient record. Excludes third party costs.

Helpdesk

A focused, responsive workspace for helplines and 'front door' teams to deliver safe, consistent triage across every channel. Built around structured triage flows, it brings contact history, consent capture and referral tools into one place, and can integrate with CX / omni-channel platforms (e.g., Five9 and Amazon Connect). Priced per workflow.

Mobile Worker Portal

A simplified user interface for mobile working. The interface is fully responsive for optimal presentation across all modern devices and has also been optimised for efficient and accurate working away from traditional desk-based environments. Priced per workflow.

Partner Portal

Empowers external partners to send referrals into your service and / or receive referrals from your service. Partners may also use the portal to update their details and to report outcomes back to your service. Priced per 500 partner organisations.

Self-Assessment

Facilitates tailored self-assessments fully integrated with caseload management with eligibility criteria. Empower patients / clients to identify their health and wellbeing challenges and aspirations via a series of questions presented in bitesize stages.

SystemOne Integration

The module enables GPs to send referrals into your service from their SystemOne environment and, if desired, for outcomes to be written back into the SystemOne patient record. Excludes third party costs.

Additional Options

In addition to Theseus modules, the following other additions may be included with (or purchased) for your Theseus system, depending on the Theseus model taken:

Additional System Support Seat

Enables an additional member of your team to create and provide feedback on support tickets (4 System Support Seats are included as standard with this Theseus model).

Additional Workflow (Service)

Manage an additional distinct service within your Theseus system with its own team, episode type and individual data capture workflow.

Additional Workflow (Pathway)

Manage an additional service pathway for an existing team within your Theseus system with its own data capture workflow.

Address Completion Lookups

Bundle of 10,000 address completion lookups using Ordnance Survey data. Improves data accuracy and saves your team time by reducing address data input requirements.

SMS Credits

Bundle of 10,000 SMS credits to send automated appointment reminders as well as ad hoc messages to patients / clients. Useful to reduce missed appointments and to contact patients / clients easily.

Video Call Sessions

Bundle of 1,000 sessions. Enables in-product launching of secure, encrypted video calls between patients / clients and workers.

DCB0155: Stop Smoking Services Quarterly Monitoring Return

Facility to support the Stop Smoking Services Quarterly Monitoring Return (DCB0155). Provides details of patients / clients eligible for the measure, along with those who met the criteria. Generation of the Stop Smoking Services Quarterly Monitoring Return Excel file for each quarter completed, ready for financial data to be entered and submitted.

National Statistics about Drug and Alcohol Misuse Treatment Dataset

NDTMS Data Extracts can be exported as a CSV format file for each NDTMS code, with options on the data range to be used for the extract. The correct NDTMS dataset is automatically used based agency type, the date the extract is run and the dates of the records within it. The resulting file is then ready for statutory reporting.

Additional Supported Dataset

Theseus support for an additional dataset.

Please see **Appendix A: Optional Additions** for a summary of what is included and optional for this model of Theseus.

Technical Requirements

Theseus is a modern web application accessed via a web browser, making deployment as quick and easy as possible. The Long-Term Support versions of Edge, Chrome and Firefox are routinely tested with Theseus.

Theseus is provided on a software as a service (SaaS) basis as a cloud hosted solution. Theseus access requires:

- Browser on an appropriate device (typically a personal computer, laptop or a tablet)
- Internet connection (fixed or mobile)
- Email account associated with a registered Theseus user

The most widely used approach for Theseus multi-factor authentication is the use of IP address whitelisting coupled with username and password - this is included as standard. In circumstances where an organisation wishes to use devices not connected via an organisation network, or where IP whitelisting is not possible, there is an option to deploy device certificates as an additional module.

For our optimised role focused interfaces, used to deliver the Mobile Worker Portal, Helpdesk Module, and Partner Portal – the application can be accessed via any modern web browser on personal computer, laptop, tablet and mobile devices. Multi Factor Authentication (MFA) is supported via username/password and authenticator apps (e.g., Microsoft or Google Authenticator).

Customisation and User Experience (UX)

Theseus can be customised to meet the needs of each service and the data they want to collect. The system is designed to be as flexible as possible for the local service manager to maintain. Examples of customisation include:

- Bespoke assessments
- Custom episodes / pathways
- Custom data and worker dashboards
- Data capture methods: drop down menus, radio buttons, checkboxes, 'search as you type' single and multi-select options
- Mandatory, optional or not applicable (N/A) fields
- Conditional Field Visibility - for showing/hiding fields based on user input
- Dynamic Forms - for forms that change structure based on user input
- Patient / client engagement features
- Patient / client 'labels'

The product team, encompassing product owners, developers and designers, work collaboratively when implementing new features. This helps to ensure all new developments are accessible, intuitive, and designed with user involvement and feedback. This collaboration helps support continuous improvement and inform future system usability.

Onboarding and Training

Theseus is designed from the ground-up to be highly intuitive and easy-to-use, enabling staff to be efficiently trained and ensuring a smooth go live of the new system.

Our approach to training is informed by expertise from large-scale deployments with large numbers and we know training is a key aspect of staff 'buy in' to the new system.

We recognise distributed teams sometimes find it challenging to commit to training sessions at specific times and we also know that staff in coordination and data roles need access to additional / more advanced training materials.

Our overall approach is conducted within an ISO 9001:2015 Quality Management System, certified by BSI. Our proven, standard implementation process is delivered using Agile project management methodology.

During the implementation your service will be assigned a highly experienced member of our Theseus team who will undertake the role of Project Manager.

The Project Manager will:

- Handle day-to-day implementation planning and administrative tasks, including arranging and planning meetings, circulating invitations and compiling agendas
- Provide friendly, knowledgeable guidance using accessible, non-technical language
- Coordinate and manage the input of Cyber Media personnel
- Clearly communicate choices available for the configuration and the value they offer
- Regularly update you on progress

Our standard training offer comprises:

- 'Train the trainer' live webinar training (up to 3 hours per service model) to system Superusers. Delivered by an expert member of the Theseus team.
- Bite-sized, module specific videos covering individual topics of Theseus system usage. These resources will be accessible on a training portal and can be accessed at any time. This aspect of our approach makes training easy to rollout and forms a lasting point of reference for refresher training and onboarding new starters.

Additional training is available through the purchase of '**Theseus Support Services**' offered under **G-Cloud 15 Lot 3**.

System Maintenance and Enhancements

Maintenance of the Licensed Program Materials is included. Theseus is subject to the following maintenance regime and processes:

- All installations of Theseus benefit from Update Packs. This ensures that whenever an issue is resolved by any user of any Theseus system, all deployments of Theseus can receive the patch.
- Theseus Update Packs are cumulative collections of hot fixes, patches and improvements. A new Update Pack is produced regularly, and each Update Pack contains the changes of all previous Update Packs. Update Packs are deployed whenever an issue is reported with a system, ensuring that whenever any amendments need making to the system, the updated fixes and patches are applied.
- All installations of Theseus are maintained on the latest version of the product
- All software is maintained in a version control system and a full audit trail of every development and test is maintained
- In accord with our change management policies, each Theseus Update Pack is initially applied to the Test system and a list of changes advised to the customer for review. The update is applied to the Live system following testing and approval by the customer. Theseus Update Packs are implemented in a manner that will not impact on system availability.
- Periodically, typically once per year, a new release is made available. Development of the next version of Theseus runs alongside the maintenance of the product throughout the year. Theseus Product Releases are full version upgrades that include improved functionality, larger enhancements, performance improvements and any changes to statutory datasets. These upgrades also include all patches developed for the previous version.

In addition to regular product support, the Licensee may also wish to request the development of new bespoke functionality from time to time. Such enhancement requests can be fulfilled through the purchase of '**Theseus Support Services**' offered under **G-Cloud 15 Lot 3**.

Service Levels and Ongoing Support

Definitions

'System User': those individuals who the Licensee has allocated access rights

'Business Hours': the Licensor's regular business hours, being from 09:00 to 17:00 Monday to Friday, on days that banks are usually open for business in London, UK

'Service Request': a request from the Licensee for technical support in relation to the Licensed Program Materials or to report an Error

'Support User': an individual nominated by the Licensee to submit Service Requests to the Licensor, i.e. a holder of a 'System Support Seat'.

Service Requests

A robust and comprehensive approach to ongoing support is provided:

- For information security your organisation will need to identify nominated Support Users who provide the main link between the System Users and the Theseus Team
- Support Users assist regular System Users and coordinate the escalation of any identified issues to Cyber Media
- The support provision includes access to an online support portal available 24/7, 365 days per year
- All support requests are allocated a unique issue number, and the status and progress of issues raised can be seen online. All that is needed to access the online ticketing system is a web browser and valid user credentials. The online interface gives feedback of ticket progress and provides a clear trail of correspondence for mutual review.
- Support Users are also able to access support escalation via telephone. Our telephone helpdesk is available 09:00 to 17:00 Monday to Friday, excluding Bank Holidays.

Support Users

The Licensor shall provide direct support to a maximum of 4 Support Users, unless additional System Support Seats are purchased at additional cost.

Only the Support Users may submit Support Requests to the Licensor. Support Users must submit Support Requests on behalf of System Users.

It is recorded that the Licensor has budgeted that it will expend no more time than that specified below in responding to and resolving Support Requests per year:

- Up to 50 System Users: 15 hours
- Up to 100 System Users: 30 Hours
- Up to 150 System Users: 40 Hours
- Up to 200 System Users: 50 Hours
- Up to 400 System Users: 60 Hours
- Up to 800 System Users: 70 Hours

If the Licensee's use of the Support Services causes these time estimates to be unreasonably exceeded, additional support can be facilitated through the purchase of '**Theseus Support Services**' offered under **G-Cloud 15 Lot 3**.

Method for Lodging Support Requests

Access to a support portal will be arranged following placement of order.

Support Users must log Service Requests via the support portal and responses will be issued via the portal. This approach ensures the identity of the Support User is securely confirmed and enables a trail to be maintained.

All Support Requests will be allocated a unique issue number, and the status and progress of issues raised can be reviewed online.

Telephone escalation is available for Support Users during regular Business Hours.

Service Level Agreement

Cyber Media shall use its best endeavours to respond to and resolve Service Requests in accord with the Theseus Service Level Agreement. The Service Level Agreement table is included below.

Priority for request	How is the System Affected?	Target response time	Target resolution time
Critical	Theseus is completely unavailable to all users	2 hours	1 day
High	Partially unusable in a way that is significantly affecting operation	4 hours	2 days
Medium	Generally usable but some aspect is causing difficulty	1 day	4 days
Low	A general question	2 days	7 days
Enhancement	Potential for improvement, but not affecting current operation of system	14 days	Prioritised following discussion

Service Resilience and Data Backups

The Service is resiliently hosted in the UK.

The Service's standard backup regime is as follows:

- The database backup regime is fully automated and designed for high reliability and business continuity
- Full backups are taken weekly, differential backups occur every 24 hours, and transaction log backups run approximately every 10 minutes
- All backups are stored by default in geo-redundant storage, meaning data is replicated to a paired region to safeguard against regional outages and ensure recoverability even in the event of a major disaster
- This architecture delivers strong protection, robust redundancy, and the ability to perform point-in-time restores
- Theseus Application virtual machines are backed up on a daily schedule. These backups are automatically replicated to a paired region, using geo-redundant storage, ensuring that all protected VM data is copied to a secondary region for resilience against regional outages.

We maintain a Business Continuity Plan (BCP) which provides overall guidance and procedures in responding to any significant incident that interrupts our business operations.

Termination of Contract

The Contract shall automatically renew for successive further periods of one year (subject to the Terms and Conditions of the G-Cloud Framework and agreed Call-Off Contract), unless:

- The Licensee gives the Licensor written notice 3 (three) months before the expiry of the Initial Term or any Additional Term ('Expiry Date') of its intention to vary the Agreement. The Parties shall endeavour to agree to amend the Agreement before the Expiry Date, failing which, the Agreement shall automatically terminate on the Expiry Date; or
- The Licensee gives the Licensor written notice 3 (three) months before the relevant Term of its intention to terminate the Agreement on the Expiry Date.

Offboarding and System Decommissioning

We recognise that at the end of the contract, ease of decommissioning and export of data is important to ensuring the continuity of care and delivery of services. To meet these needs, we provide a service to export the data from the system, giving an opportunity to review and approve the data export before the decommissioning of the application environment.

We will provide a complete CSV extract of service data and arrange for secure transfer. If additional data migration or extraction services are required, these are available via **Theseus Support Services** offered under **G-Cloud 15 Lot 3**.

To provide data to services whilst maintaining the confidentiality and integrity of the data held within Theseus, we follow a three-stage plan for exporting and decommissioning:

Stage 1: Cyber Media Notified of Need to Decommission the System

The Licensee will provide Cyber Media with 90 days' notice (or specific period in accord with agreed contract) of contract end with a request to export the data held within Theseus and decommission the system. The dates to produce the data export will need agreement, e.g. when the system is considered fully up to date at the end of a month. A Cyber Media project manager will be assigned to oversee the exit project.

Stage 2: Locking Access to System

Before beginning the export of any data, we will ask for a nominated contact who will be responsible for reviewing and signing off the export.

We will then confirm that the Service has ended, and we will lock access to the Live system to all users other than the nominated contact so that data can no longer be changed.

Stage 3: Export of Data

Data is exported and transferred via secure means.

Service Definition Summary

The Service is inclusive of the features identified below.

Theseus: Referrals Management model, including:

- Fully featured patient / client record with patient / client details, attributes, associated professionals and dependants
- Patient / client search with aliases
- Patient / client event recording
- Integrated safeguarding, risk and consent features
- Standard dashboards including caseload allocation, follow-ups due and data quality
- User management and password reset facility
- Comprehensive system audit trail
- Access to configured test system when required
- Access to Theseus training videos
- Webinar training session for Superusers
- System maintenance and ongoing support

With

- Standard service deployment
- 4 x System Support Seats
- 1 service workflow
- Referrals Module
- Partner Portal Module

Plus

- Any optional modules and additions taken
- Any bespoke customisation required via '**Theseus Support Services**' offered under **G-Cloud 15 Lot 3**

Appendix A: Optional Additions

The following table sets out the elements included, as well as available options, for this Theseus model.

Theseus: Referrals Management	
Additional Workflow (Pathway)	Optional
Additional Workflow (Service)	Optional
Additional System Support Seat	Optional
DCB0155: Stop Smoking Services Quarterly Monitoring Return	Not available with this model
NDTMS Dataset	Not available with this model
Appointments Self-Booking Module	Optional
Certificate Access	Optional
Email Reminders and Notifications	Optional
Entra ID (Azure) 365 Calendar	Optional
Entra ID Module (Azure Active Directory)	Optional
Diary and Booking Module	Optional
Engagement Website Module	Optional
Flexible Form Builder Module	Optional

Theseus: Referrals Management	
Outcome Form Builder	Optional
Partner Assessments Module	Optional
Post-Treatment Follow-Ups Module	Optional
Pre / Post-Appointment Assessment Forms Module	Optional
Referrals Module	Included as standard with this model
Satisfaction Surveys Module	Optional
Service Directory Module	Optional
Ambient Voice Technology Enablement Module	Optional
Client Portal Module	Optional
Data API Module	Optional
EMIS Integration Module	Optional
Helpdesk Module	Optional
Mobile Worker Portal Module	Optional
Partner Portal Module	Included as standard with this model
Self-Assessment Module	Optional

Theseus: Referrals Management	
SystemOne Integration Module	Optional
Address Completion (PAYG)	Optional
SMS (PAYG)	Optional
Video Calls (PAYG)	Optional