

Personal Budgets & Individual Support Costs Software

Service Definition (2026)

About CDPSoft

CDPSoft is a software supplier based in London, with experience in the design, development, and supply of specialist, advanced software products for the Public Sector. Since 1994, we have provided solutions that enable you to increase productivity and utilisation, reduce cost and administration and improve overall service quality and outcomes.

Our award-winning cloud solutions are used across a diverse range of sectors and disciplines in the UK.

CDPSoft has solutions in:

- **Critical ‘people-centric’ areas** such as Housing, Care, Support, Independent Living and Personalisation. Deployments include Local Authorities (LA), Care/Support Providers (including LA commissioner/funder, MHS reporting), Housing Associations, Charities and multi-agency/multi-authority partnerships and consortium delivery models.
- **Housing Options (including statutory H-CLIC reporting).** Designed around the Homelessness Reduction Act (HRA), our Housing Options solutions manage all aspects of homelessness presentations from prevention/relief to reviews and appeals.

- **‘Task Force’ settings** for targeted requirements such as specialist configurations for Housing Support Grants (HSG, including OHID statutory reporting), Modern Slavery/Human Trafficking, Commissioning Groups and Outcomes Management.
- **Local Authority and multi-agency settings** such as Assessment and Referral Pathway/Gateway, Single Point of Access, Service Coordination and Commissioner Contract Management.
- **Client Access Portals** including Online Forms, Support Plans and Action Plans, Documents and Messaging.
- **Artificial Intelligence (AI) capabilities** for productivity, analysis, governance and compliance.

Designed with flexibility in mind, all our cloud solutions draw from a purpose-built, highly configurable suite of software components. You get bespoke customisation options with the future-proofed economics, scalability and support of a modular product.

A crucial part of CDPSoft’s approach is customer-led development, working in partnership with customers and user groups to combine sector expertise with software capability, ensuring solutions directly improve service delivery and outcomes.

Solution Overview

As a secure, cloud-based solution, CDPSoft's Self-Funded Care and Personal Budget Management Platform supports local authorities, care providers and support services to manage adult social care casework where individuals fund their own care and support or receive personal budgets. The platform provides a single system for coordinating care and support, costs and outcomes.

The solution is designed for services supporting adults using self-funded care and support, direct payments and personal budgets, including individuals accessing domiciliary care, supported living and community-based support. It supports consistent recording of eligibility decisions, care and support planning, financial contributions and support-related costs.

The platform enables structured management of assessments, reviews, care and support plans and agreed budgets, alongside safeguarding activity, outcomes tracking and provider engagement. Information is recorded at the individual and household level, providing a clear audit trail from initial assessment through to review and change.

Built to adapt to local adult social care practice, the platform is delivered through configurable cloud components. Forms, assessments and data capture can be aligned to eligibility criteria, charging policies and personalisation approaches.

Organisations can deploy this system as a dedicated system or extend it flexibly to complement existing systems, such as health, housing, safeguarding, contract management, and support services, to enable joined-up delivery.

Key Core Areas Available:

- Self-Funded Care and support, and Personal Budget Case Management
- Configurable Form Options (build-your-own),
For example
 - o Financial and eligibility assessments
 - o Support-related cost and contribution recording
- Care and support planning aligned to personal budgets
- Safeguarding and risk recording for adults funding care
- Safeguarding and vulnerability risk recording
- Provider and placement management
- Case notes, decisions and audit history
- Document and evidence management
- Integration with commissioning and contract management systems

both operational management and strategic planning purposes.

Standard Platform

Components and Capabilities

The CDPSoft platform provides a single, configurable system for managing casework, services and outcomes across housing, care, support and advice services. It supports both simple and complex delivery models, enabling organisations to manage client journeys, pathways and service activity within one secure, scalable solution. Services can be delivered individually or across multiple teams and partners using a consistent digital approach.

The platform enables consistent assessment, support planning, safeguarding and multi-agency coordination, with structured workflows that reflect local policies and working practices. Secure information sharing, role-based access controls and full audit trails support effective collaboration while maintaining strong governance and accountability. Configuration options allow organisations to align processes, thresholds and terminology to local operational requirements.

Integrated reporting and management information tools provide visibility of activity, performance and outcomes across services.

This supports commissioning, contract monitoring, inspections and assurance, while enabling organisations to evidence impact, improve service delivery and make informed, data-led decisions. Reporting can be used for

Examples of other services you can manage in the system

With a vast range of optional, tailorable features, we are able to cater for the majority of single or multi-agency case management requirements and tailor the solution to your working practices. A wide variety of services, pathways, client journeys and the associated monitoring and reporting requirements can be deployed in a single solution.

The solution can be deployed for both simple and complex requirements, such as:

- Single/Multi-Agency Case Management
- Housing Related Support
- Provider Care Management
- Floating/Visiting Support Teams
- Commissioning & Contract Management
- Housing Options and HRA/H-CLIC
- Housing Support Grants (HSG)
- Resettlement Services/ Outreach
- Prevention Services
- Learning Disabilities and Special Needs
- Residential or Home Care
- Substance Use Services (NDTMS)
- Employment Support Services
- Family Support Services
- Young People Services
- Leaving Care Services
- Domestic Abuse Services
- Self-Funded Care/Personal Budgets
- Health & Well-Being

Case and Service Management

- Client, household and case management across services
- Case notes, tasks, visits and engagement
- Case progress, outcomes and financial gains
- Client portal and SMS/email communications

Forms, Assessments and Data Capture

- Configurable forms builder
- Needs, risks and vulnerability assessments
- Support Costs, Rents, and Contract Management
- Online and mobile data capture
- Property standards and address compliance
- Dynamic waiting list updates and case prioritisation

Support Planning, Safeguarding and Risk

- Support/action planning aligned to individual goals
- Safeguarding, risk and incident recording
- Alerts, escalation workflows and workflows

Multi-Agency Working and Coordination

- Referrals and multi-agency coordination
- Secure information sharing with partner organisations
- Role-based access controls and audit trails

Document, Reporting and Assurance

- Document and evidence management
- Integrated reporting and outcomes monitoring
- Microsoft Power BI compatible dashboards and data feeds
- Data governance, compliance logging and integrations
- Quality assurance for service delivery
- Loans, recharges and course components
- Financial intelligence and contract monitoring

Platform Security, Infrastructure and Integration

- Single Sign-On and Two-Factor Authentication
- Secure ISO 27001 UK Tier III data centre
- Data retention and information governance controls
- System integration and interface options
- Scalable deployment across single or multiple services

monitoring, and planning

System requirements:

The minimum supported specification is the latest releases of Microsoft Edge, Google Chrome, and Safari.

The solution will work on any internet-enabled device. In terms of PC specification, since the solution is browser-based, it does not impose much of a load on the host PC; the minimum requirement is Windows 11 (until the end of Microsoft support) or later with at least 2GB of memory.

The solution is not media-rich, so data transmission is light and only restricted by the amount of data that will be used.

Hosted Service Summary

The hosted service is provided from an ISO 27001 Information Security and ISO 9001 Quality Management Tier III data centre that is based in the UK. The primary environment is located in a sub-terrain, steel-reinforced concrete shell, with externally monitored alarms. Access control is by access fob and physical key controls. A one-hour UPS protection system is in place, and a dual power capability for mains grid electricity supply and cold standby generators. Environmental conditioning is currently provided by three 40% utilised refrigerated air conditioning units.

Business Continuity / Disaster Recovery Plans are operation-wide and are therefore not tailorable to a Buyer's own plans. Non-sensitive plans are available for the Buyer to review on request, prior to entering a Call-Off.



Customers deploying the solution have found improvements in the following areas:

- Improved access to services and faster referrals
- Quicker assessments and placements
- More appropriate referrals and service matching
- Effective management of waiting lists and vacancies
- Stronger case management
- Improved service coordination and collaboration
- Secure and efficient information sharing
- More efficient use of resources and capacity
- Enhanced safeguarding and risk management
- Improved reporting, outcomes

Summary of arrangements in place:

- ISO 27001, ISO 14001, ISO 9001, ISO 45001
- Cyber Essentials Plus
- Business continuity, dual hosting sites in the event of denial of access to primary location.
- Host Intrusion Prevention application in addition to Perimeter; ISO 27001 (BS7799) and dedicated Firewall installations.
- Host Intrusion Prevention (Host IPS) for servers, monitors and blocks unwanted and suspect activity and threats. Host IPS for servers maintains server uptime and protects assets like applications and databases. It utilises multiple methodologies, including signature and behavioural intrusion prevention, a system firewall and application- blocking

Availability

The Hosting Servers for the Licensed Programs will be available 24/7, excluding scheduled downtime and emergency security patches. The Licensor will use all reasonable endeavours to meet a 99% Service Level against this target.

Support & Service Levels

CDPSoft covers the rapid correction of any errors in the code, crashes, loss of data, performance management, regular security penetration testing, plus ongoing enhancements of the Licensed Programs. We undertake to provide a number of people who understand the client system and are able to both provide necessary support for

controls with automatic vulnerability shields and security content.

- https:// - minimum 256-bit encryption.
- Rolling near real-time backups, keeping systems within 5-15 minutes of live systems.
- Humidity, smoke and moisture monitoring linked to email/ SMS notification direct to the operator's team.
- Warm standby policy offering four-hour recovery as standard.
- Software patched to the current release. Patching and updates will be maintained for the life of the installation.
- Daily images are retained for up to 90 days.
- All backups are held on a secure device, accessible from only the data centre network.

ongoing issues and also deliver any necessary upgrades. One of the team will be assigned as the lead role for the client, and it will be part of this individual's job to maintain effective working

relationships with client personnel to provide professional service. We believe that this is key to a successful ongoing relationship.

Initially, this person will be one of the system's senior developers. This person may be changed from time to time with a fully trained alternative. Our documentation and knowledge-transfer processes ensure the company retains sufficient knowledge of the system. Our very low staff turnover, along with long-term stable partnerships, helps to retain expert knowledge over time.

We will use all reasonable endeavours to adhere to the Service Level Agreement detailed in the table below. We have a dedicated help desk and use an online help desk system to receive, track, respond to and monitor all help desk tickets.

Error Category	Response Time (Phone)	Response Time (Onsite)*	Temporary Fix	Permanent Fix
Major Error	4 hrs	Same day if received by 16:00	1 Working Day	5 Working Days
Serious Error	4 hrs	Next Day	1 Working Day	5 Working Days
Other Error	4 hrs	By agreement	5 Working Days	10 Working Days

*On-site is not standard in the Service Level Agreement.

Please note: a Fix may be achieved in up to 10 Working Days, but may be included in a future release/update, which will require an update at a later date at the Licensor's sole discretion.