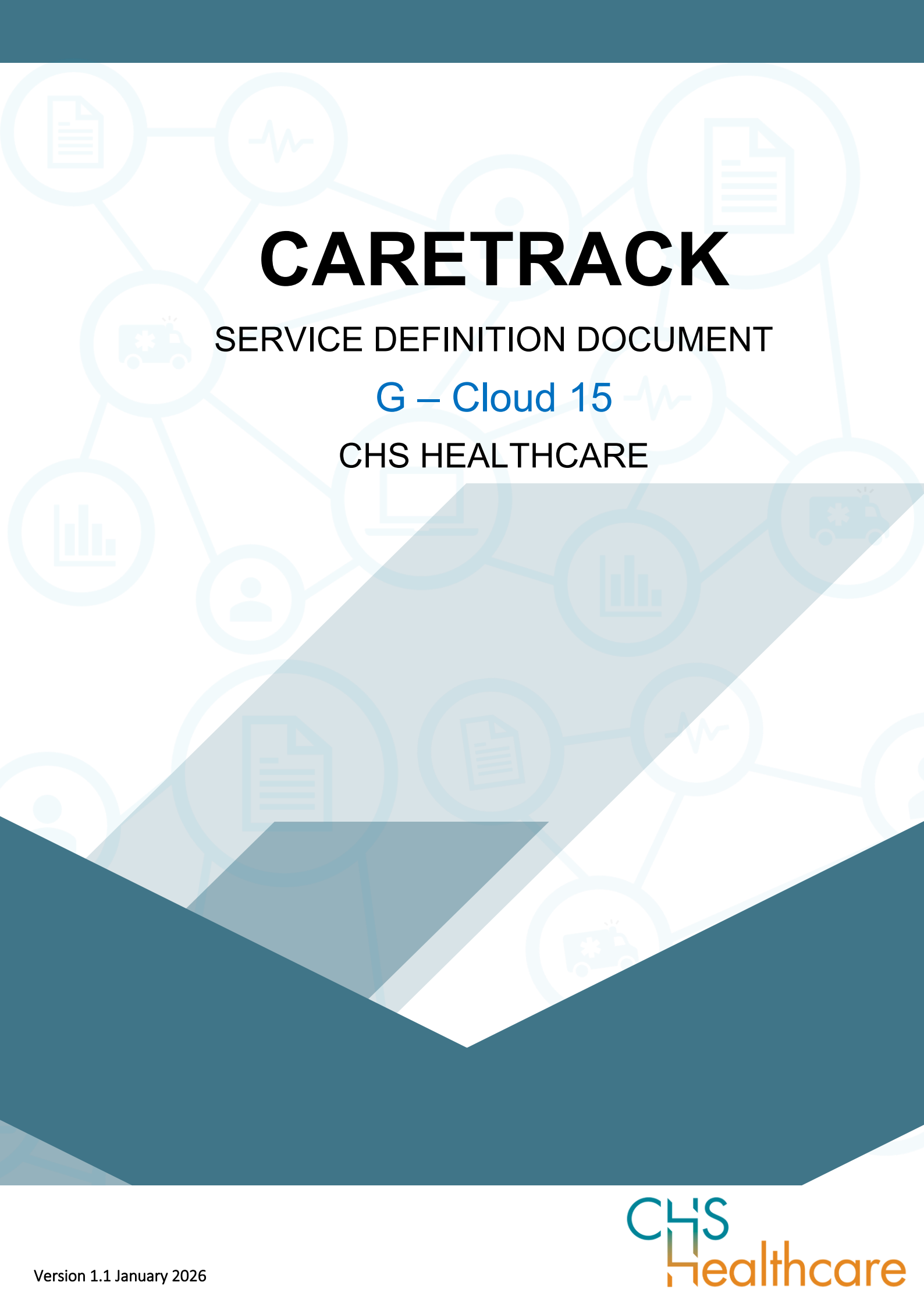




CARETRACK

SERVICE DEFINITION DOCUMENT

G – Cloud 15

CHS HEALTHCARE

What is CARETRACK?

Caretrack is a purpose-built, fully web-based digital database designed to manage All-Age Continuing Healthcare (**CHC**), Funded Nursing Care (**FNC**) and complex-care patient pathways. The system supports secure electronic referrals with digital data validation and maintains comprehensive clinical and financial records, including next-of-kin details, care packages, provider information (including payments), workflow management, review scheduling, document storage, letter generation, financial forecasting and reporting such as the quarterly DHSC return and care provider oversight. It features a real-time dashboard, extensive reporting capabilities and access to a dedicated helpdesk service. The system is overseen and continually enhanced by an assigned Product Manager.

Backed by CHS Healthcare's extensive expertise in CHC management, Caretrack has evolved over many years as a result of our hands-on experience delivering CHC services. Since its launch in **2009**, the platform has undergone continuous improvement and development. CHS Healthcare uses Caretrack operationally to support delivery of our own CHC services, ensuring we engage with the system in the same way as an ICB or other CHC provider.

Caretrack is securely accessible at any time and benefits from a quarterly development release programme delivered at no additional cost. Each release includes updated user guidance, training webinars and full support from the Caretrack helpdesk.

The system is used by more than **1,500 users** across over **15 ICBs** and holds data for more than **40,000 patients**. We are also proud to support NHS England, who utilise Caretrack across all seven regions to manage data relating to Independent Reviews for patients appealing CHC eligibility decisions.

Caretrack is designed as a comprehensive patient management system, enabling full oversight of an individual's journey through the Continuing Healthcare process. It also functions as a database of care providers and key patient contacts. All communication requirements are recorded within the system and automatically flagged for relevant contacts held within the system.

Our Product Offers

- End-to-end management of patient data for CHC, FNC, complex care
- Support for all case-related processes including assessment, review, panel, appeal.
- Care home and domiciliary care provider data management, **delivering savings of 5%** on CHC commissioned budget
- Brokerage process - full data management.
- Full, auditable financial data set - enables financial forecasting.
- Live dashboard showing: CHC KPIs, activity, workload and finance.
- Digital referral portal
- Digital CHC and Fast Track Forms
- Comprehensive reporting in real time through predefined and ad-hoc reports.
- Full storage of all incoming/outgoing correspondence and associated documentation.
- Standard letter generation.
- Dedicated Support Desk
- Dedicated Account Manager
- Training/expert advice & guidance on set-up, usage, exit
- Support for all decision-making processes (including DST), throughout patient journeys.
- Allocation/ownership/progress of caseload by case manager.
- Full financial visibility and control (historical, current, future).
- Insightful reporting at: case, user, team, organisation.
- Customisable elements
- Rapid set-up
- Remote/off-site working via by secure internet access.
- Continuous improvement and efficiency enabled by expert training, support/advice.
- Product development via feedback/our user

Alignment with the SBS Financial Workflow

Caretrack is designed to supplement the existing Shared Business Services (**SBS**) Oracle finance system that makes all NHS payments. The Caretrack system is designed to mirror that of the SBS finance system to ensure smooth and effective payments for providers. When validating payments on the Caretrack system users have two options. The first is to process invoices individually and the options to do so mirror that of the SBS financial system. The second option is to validate payments electronically. This negates the need for any providers to generate invoices. The one electronic payment report can then be run through SBS's finance system at a click of a button to enable actual payment for providers.

Service impacts of Caretrack

- Allow organisations to bring their payments function in-house, significantly reducing operating costs whilst helping to meet national standards, identified KPIs and forecasting.
- Detailed, insightful view of cost/spend, allowing creation/sharing of reports, supporting complex decision-making.
- Excellent ongoing value for money, through a licence fee-based commercial proposition, which includes helpdesk.
- The ability to electronically transfer IR documents to NHS England rather than having to manually prepare the pack – resulting in faster, more efficient, more accurate reporting.
- Digital referral module, providing efficiencies (validation of data/automatic data transfer), improving quality of referrals.
- Improved efficiency, security and quality of data with digital forms including electronic checklists, DSTs and Fast Track tools.
- Access to CHC expertise via the wider CHS Healthcare team.

Onboarding and offboarding support

Each client is designated a contract account manager, who acts as the first point of contact for queries, and who will attend meetings and provide updates/reports at frequencies and formats agreed during the contract implementation. They will be available by phone and email during normal office hours.

Implementation plan

Planning and deploying the solution

On contract award, each project will be allocated a project leader who would hold a joint project kick-off workshop attended by the client team and the CHS Healthcare team. The objective of this would be to agree at a working level how we will work together and gain a common understanding of delivery milestones. We anticipate the resources required from the client side would include at least: Project lead, Data lead, IT lead, IG lead, Operational lead, HR / training lead, Safeguarding lead, Finance lead.

Throughout the life of the project strict project controls will be applied to ensure the project is delivered within the measures of cost, time and quality agreed and expected by all parties.

During detailed project planning all activities, including those of the client will be captured centrally, along with risks, assumptions, issues and dependencies (RAID log). Weekly conference calls will also take place with the assigned project manager from the client to

ensure project progress.

Configuring and tailoring the solution

Our project procedures ensure a comprehensive review of requirements at the outset. This will be led by the CHS Healthcare Project Manager (PM) with support from the project team. The PM will work with the client to ensure a full requirements data set and corresponding test plan is documented, that fully meets the client's needs, including the delivery of functional and non-functional system components. Final requirements will always be agreed with the client prior to contract commencement. After every project we conduct a lesson's learnt session internally/with the client. We share learning via our user forums and working development groups.

Customisation

The system is customisable according to local requirements: a designated team will discuss, capture and record the full scope of the client's requirements in an initial meeting to be attended by the project team from both parties.

This will then form the basis of the implementation plan, which we will firm up at this time, agreeing tasks, milestones and ownership.

As part of the system build, we will agree bespoke user access levels for each role within the client (e.g. Administrator, Finance, Commissioner, Director, etc). CHS will guide and suggest access levels to but, ultimately clients can build their own unique access levels to suit each role. The system can accommodate temporary access being granted to users that need to see (for example) transition patients.

Customisation in reporting

In addition to a suite of 66 standardised reports designed to provide stakeholders with relevant information, Caretrack also incorporates a user-friendly ad hoc report builder. This enables all fields within the database to be reported on, if required. We also have a dedicated MI/BI tool with over 25 live dashboards.

Service levels

Availability

Caretrack is available 24/7/365. Downtime is generally only ever needed for major hardware system (server) maintenance upgrades; these only happen once or twice a year and will always be outside of working hours.

Maintenance

Scheduled downtime may occasionally be necessary to carry out essential maintenance or network upgrades. This will be kept to a minimum and scheduled to minimise disruption. We aim to provide 7 days' notice of scheduled downtime, performed during a window between the hours of 19:30 and 07:30 UK-time, Monday to Friday. If emergency maintenance is required, we will use reasonable endeavours to give prior warning and will endeavour to keep such maintenance to an absolute minimum.

Support hours

Day-to-day contact/support for clients will be the dedicated Caretrack Support Desk, operated 8:30 am – 5:00pm, Monday to Friday. Incidents and service requests can be raised directly by users by email or by telephone; our team can log requests in the service system on the user's behalf. Full history and progress of requests can be viewed using the online portal. When a user creates a ticket, they nominate the priority. The

Support Desk conforms to ITIL best practice, with all calls triaged on arrival. Higher priority calls are escalated from the first line team to the second line (developer) team as required.

Reporting

Caretrack has been developed with a suite of 66 standardised reports, designed to provide stakeholders with relevant information. In addition, it incorporates a user-friendly ad hoc report builder. This enables all fields within the database to be reported on, if required.

Caretrack also features a CHC, Fast Track & FNC reporting live dashboard. This enables the user and CHC leads to see quality premium stats and many other KPIs on a 'live' basis and enabling real time reporting without the user having to physically run reports.

Caretrack also has a full suite of reports for the Quarterly DoH funded care return tables. The assessment and review management tiles allow CHC managers to see entire caseload and, which cases are allocated to which nurse assessor/case manager. This provides the CHC team the ability to ensure an even spread of work and allows managers to keep on top of the 28-day quality premium target. The dashboard and majority of reports can be exported into PDF, Word, CSV, Excel or viewed on-screen.

Ordering and invoicing

Orders will be taken in line with the terms of the G-Cloud framework agreement; we will maintain our terms and conditions for the customer, including the pricing in our Digital Marketplace entry at the time of the order, for the length of any contract. A PO and invoice for the purchase of Caretrack must be raised and paid prior to go-live of the system.

Terminating a contract

Our standard contract includes a Termination clause, offering either party rights to terminate and covering the exit arrangements that would follow thereafter.

After-sales support

We deliver a quarterly batch release programme of developments that are completely free to our clients. Developments are accompanied by a full user guide, a training webinar and full support from our dedicated Caretrack helpdesk.

Technical requirements

Caretrack is fully mobile so long as the user has an internet connection, Caretrack can be accessed securely at any time. As the Caretrack system is hosted by CHS Healthcare in secure UK data centres, there are no hardware requirements for the client. The only technical requirement needed to use Caretrack fully is an operating system of Windows 7 or above and, a browser of Microsoft Edge or Google Chrome. A new scheme can be established in a matter of days, being essentially 'plug and play', but CHS has a wealth of experience of liaising with local IT support to ensure Caretrack's web address is prioritised through the HSCN network.

Business continuity

We have a fully documented Business Continuity Plan and Disaster Recovery Policy to enable us to maintain essential business activities following a major disruption. The BCP considers a range of scenarios including loss of premises and staff, as well as systems. It is reviewed and tested regularly to ensure its ongoing fitness for purpose.