Birdie for Home Care

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1. About Birdie

Birdie is on a mission to revolutionise the ageing journey. Launched in 2017, its homecare platform now empowers over 1,000 care providers to transform every area of their operations, from care delivery and finance, to auditing and scheduling.

Committed to paving the way for care providers today while redefining what's possible in care tomorrow, Birdie was ranked sixth in Deloitte UK Technology Fast 50 in 2023 and invited to Tech Nation's Future Fifty programme in 2024.

Birdie is headquartered in London and employs a team of over 185 employees.

2. Birdie for Home Care

Birdie equips homecare providers with essential digital tools for managing, delivering and championing outstanding care. This includes mobile and desktop software used by care businesses of all sizes to manage care delivery, rostering, finance and auditing. Alongside their technology, the Birdie team provides a host of free, practical resources and support for the care industry including an online community, meet-ups and knowledge sharing forums.

Birdie works by the side of partners to uplift them today, and help them fly in the future.

Features are dependent upon the Birdie for Home Care package chosen by the care provider, but key Birdie features include:

- Electronic Medication Administration Records (eMAR)
- Family App and Third Party Access
- Clinically validated digital assessments
- Person-centred task management
- Integrated Messaging (from Back Office to Carers)
- Suite of Finance tools, including gross pay data generation and invoice generation and exporting
- Suite of Rostering tools, including templates, runs, drag and drop
- Real-time alerts and incident management tool
- Easy-to-use app for carers
- Suite of auditing tools, including service review forms, tags to collect evidence and more
- Real-time digital care logs

Over 1,000 care providers use Birdie to transform the way they care, unlocking a new way to operate and building a supported workforce of carers. We empower businesses of all sizes with the innovative tools needed to thrive. While specific benefits may be dependent upon the Birdie for Home Care package chosen by the care provider, they include:

- Move from reactive to proactive care and improve client outcomes
- Deliver higher quality, person-centred care and lead the way in care
- Minimise risks, particularly medication errors and delivery blindspots or mismanagement
- Reduce time spent on administration, including delivering and auditing paperwork
- Build supported, empowered care teams with easy-to-use tools
- Provide peace of mind to all members of the care circle
- Easily share updates with carers in the field
- Make better decisions with pre-built reporting and insights
- Give time back to finance teams, with streamlined processes
- Maintain compliance with the latest HRMC and care regulation

To learn more about Birdie's commercial offering, please refer to our Pricing document. To speak to Birdie's sales team or take a self-directed virtual tour of Birdie's product, please visit our website.

3. Security

I. Threat and risk detection

Birdie uses multiple internal and 3rd-party tools for monitoring its production environment and protecting it against potential threats or errors:

- An internal notification mechanism is in place to alert Birdie operations and support teams on different anomalies detected in production.
- AWS analytical tools are configured to continuously monitor Birdie's production environment status, including server availability, CPU, memory, disk space and other key metrics; the Cloud Monitoring tool also sends alerts to Birdie's operations team based on preconfigured policies.
- HoneyComb and DataDog are used for live production monitoring via Open Telemetry and logging
- Sentry is used for live production bug and regression tracking

Birdie also operates a support ticketing system allowing administrators and end-users to report any issues or errors they encounter while using Birdie's web-based solution.

When we find a potential compromise, we follow our Incident Management Process and declare an incident in our internal communication channel, assemble a team, identify the issue and work to mitigate its impact. We have on-call engineers available at all times to respond to incidents as soon as they have been identified.

II. Business Continuity and Disaster Recovery

All of our infrastructure and data are spread across 2 AWS availability zones and will continue to work should any one of those data centres fail. We have a Disaster Recovery Plan, which is formally reviewed once every 12 months and in response to regular testing. Birdie's Disaster Recovery Plan document details the policies and procedures of Birdie in the event of a disruption to critical IT services or damage to IT equipment or data. These processes will ensure that those assets are recoverable to the right level and within the right timeframe to deliver a return to normal operations, with minimal impact on the business. It also outlines Birdie's approach to handling a service continuity incident, a plan for recovering information following a service continuity incident as well as how we restore services for our customers. Copies of our Business Continuity and Disaster Recovery can be shared upon request.

III. Backups

Database backups of Birdie's production system are taken regularly. These backups allow, in the event of a disaster, the creation of a replica environment within a minimal period of time. Backups are stored in a different AWS environment and region (eu-west-1).

IV. Incident Response

We recognise that Birdie may be critical to the well-being of thousands of people and businesses. That's the reason why we have on-call engineers available at all times. Birdie has a pre-defined process for incidents.

For planned maintenance and unplanned outages, Birdie's Customer Success and Account Management team directly communicates to every user via in-app notifications, phone, and/or email, as outlined in our Incident Response Plan. We will always measure the impact when dealing with an incident. Each incident should be classified according to the harm it will do to an individual (severity) and the likelihood of it occurring based on the number of users. The impact is measured using the Bug Triage Framework. The higher the impact is the faster we'll resolve the issue according to Birdie's SLAs.

4. Onboarding and offboarding support

At Birdie, we take a partner-based approach to implementation and post-implementation support. When a care agency joins Birdie, our team becomes an extension of theirs and is on hand to support them every step of the way.

I. Onboarding

Agencies will have a dedicated onboarding manager, who will take the time to know specific challenges and create a bespoke implementation plan including key actions and timelines.

Based on the agency's needs and goals, implementation can include: A kick-off call, a series of welcome emails, a review of any platform integrations required; complete integration of data and existing care plans, client and carer profiles; Interface setup within Birdie; Carer training and onboarding to mobile app; a SMS campaign to onboard carers and remind them to switch to Birdie; and introduction of Birdie to clients and their loved ones.

a. Training resources

Birdie holds frequent training webinars for both carers and office staff as well as frequent best practice webinars. There's also on-demand access to training resources, including the Birdie help centre and FAQs with informative articles, an online 30min course on the Birdie Academy and on-demand webinars.

b. Customer Support

Birdie's support team is available to action any question, concern or query our partners may have. Support is offered 7 days a week Using Intercom via email, live-chat.

Doing the right thing is very important to us and we measure Customer Satisfaction via our Intercom system for all of our Support interactions. We take all requests seriously and provide clear, personalised answers and in line with our company values, 'We Care' and this is clearly shown by the feedback we receive and our overall results.

b. Implementation packages

Providers with 141 or more Care Recipients are required to purchase an implementation package with us. These packages have been carefully designed to ensure you are set up for success with Birdie. Please refer to our Pricing document for a full breakdown of what is included and relevant fees.

II. Off-boarding & Access to Data upon Exit

As soon as a client decides to terminate its contract with Birdie, the dedicated Account Manager will immediately book an offboarding interview with the main agency stakeholder to confirm the date they intend to stop using our platform and confirm the date at which they will lose access to Birdie. We can provide the agency as much lead-time as they'd like, including a 3-month planning period as needed for them to be successful in their move to another provider. We will also discuss how we handover their data in order to support a smooth transition. This includes coordinating with Birdie's Technical Team on their behalf and providing information that's needed for their new provider in order to ensure a successful transition.

Key offboarding steps include:

1. Generation of the CSV documents to extract the client's data, including Carer and Client profiles, visit logs, assessments, care plans, medication. This does not come at any additional cost for the client. The export data is encrypted at rest using an industry-standard AES-256 encryption algorithm. Whilst downloaded by the exiting agency, the data is encrypted in transit using 256-bit encryption.

2. After the data extract is done and shared with the client, Birdie deletes the client's data on its database and cancels future payments for this client.

Birdie will also send email reminders that communicate clear timelines and actions across termination of service and removal of data.

5. Service constraints

We carry out planned and unplanned maintenance from time to time. Where possible, we will always try to carry out maintenance outside Normal Business Hours and to give you at least three hours' notice in writing (via email).

Our services also are also subject to constraints inherent in the use of communication networks and facilities.

6. Service levels

I. Performance and availability

At Birdie, we are committed to providing our partners with a secure and reliable experience. That's why we've worked to achieve an uptime of 99.9% or higher.

II. Support

We provide support using a tiered support model.

The first level of support we provide is proactive, using purpose built workflows, help centre articles and AI chat bot to direct users to either our help centre or specific curated help files to help resolve their query. This service is available 24/7.

For issues the help centre or AI chat bot can't help with, then we have a 'Tier 1' team on hand, who will answer the chat within 10 mins of it reaching them and have an average handling time of 15 minutes to resolve issues. This team is on hand from 7am till 8pm weekdays and 9am to 6pm on weekends. The team is trained to deal with all customer segments and aspects of the system.

Should there be a potential bug or issue with the system, our Technical Support Team (Tier 2) will take over and will troubleshoot, triage and use systems to further identify the issue. This

team will respond within 20 to 60 minutes depending on the priority of the issue with a usual average time to resolve of an hour. If needed they will liaise and work with our product and engineering teams to prioritise bug fixes and the communication with the user. This team is also the point of contact for any business critical incidents to provide updates with customer facing and engineering teams. This team is available Monday to Friday, 9am till 6pm.

Lastly users can access Premium Support for £120 per branch per month, which includes first response time of 5 minutes or less, scheduled outbound call/screen share service offered at support team's discretion (Available Mon to Fri, 9am-5pm) and answers provided by a dedicated support team to serve your needs, comprised of our most senior support associates.

We do not provide a technical account manager or cloud support engineer but we do have a team of them on call at all times.

7. Technical requirements

To use the Birdie Platform, you must have a suitable web browser and/or suitable hardware to support a mobile application. Birdie's Agency Hub is accessible via desktop and/or web browser, including mobile web browser. The Birdie Carer App is available on both iOS and Android devices.

For Birdie app, smartphone operating system and device requirements:

- If using Android phone, operating system Android 9 or above, any phone released within 2 years, CPU core speed of at least 2.0 GHz (preferably above 2.2 GHz)
- If using iPhone, iOS 15 or above, iPhone SE (2022) or newer

For Birdie Agency hub, web browser requirements:

- Chrome (last 5 versions)
- Firefox (last 5 versions)
- Safari 12 or above,
- Edge 18 or above

8. Hosting

Birdie services and data are hosted in Amazon Web Services (AWS) facilities (eu-west-2) in the UK. Birdie also utilises a number of sub-processors based in other locations.