

HealthManager

Service Definition Document

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1. Service Functional Definition

1.1 Introduction

HealthManager is the latest addition to our portfolio of products to support prevention, community health, and digitally enabled models of care. HealthManager takes the industry leading functionality of QuitManager, but with the ability to add other Pathways of Care which can be managed either with or without the smoking cessation pathway.

QuitManager is the Market leading smoking cessation database application and has been in use since 2007. In 2024 over half the Local Authorities submitting their Quarterly Data to NHS Digital used QuitManager (or HealthManager) to manage their smoking cessation service, and it is currently the National Solution for Wales, Ireland and Jersey. With over 100 QuitManager/HealthManager deployments to our name; most involving a data migration, no other application supplier has the experience we have in this area.

Our feedback throughout has been excellent, and we have had numerous services offering to act as references for the service and quality we provide. On top of this, and as part of our ongoing drive for enhancing customer satisfaction; we are working to deliver measurable client service excellence, with an enhanced focus on customer feedback and interaction throughout the duration of contracts.

Regular reviews are being undertaken with each client to ensure we can meet any further needs of the services, ensuring they are getting the most out of the application, and ultimately helping improve patient outcomes.

1.1.1 Functionality Overview

The following diagram provides an overview of the HealthManager application and the current available modules and options. Bionical Solutions are constantly updating the product roadmap, as such new features and modules become available throughout the year.

This shows all the functionality within the solution and provides details of which modules are included as standard, and which items are optional.



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Referral and Data Modules

Referrals

- ✓ Create new referrals into the service
- ✓ Process imported referrals
- ✓ View and Manage Referrals Inbox
- ✓ Capture triage information
- ✓ Create associated clients and episodes of care
- ✓ Flexible Pathway Eligibility Rules
- ✓ Core questionnaires such as Audit C, GPPAQ
- ✓ Signposting Options
- ❖ Optional External Web Referral form

Referral & Data Import

- ✓ Standard data import options and API interfaces
- ✓ Integration with the National Referral System (NRS)
- ❖ Custom data import options and API interfaces
- ❖ Initial Data Migration
- ❖ EMIS/PharmOutcomes Importer Module

Reports, Letters & Data Export

- ✓ Full suite of Standard Reporting
- ✓ DH Returns
- ✓ Standard Letter Templates
- ✓ Extract of data for all referrals and episodes
- ❖ Payment Reporting Module
- ❖ Visual reporting dashboard
- ❖ Customised Letter Templates

- ✓ **Standard Functionality**
- ❖ **Optional Functionality**

Pathways



Smoking Cessation



Weight Management



Health Checks



Drugs & Alcohol



Lifestyle Services



Bespoke Pathways

Core Modules

Clients

- ✓ Find, List, Add and Edit Clients
- ✓ View History & Access Details
- ✓ Create multiple episodes of care per client

Episodes

- ✓ Edit/View Address, Contact and Care information
- ✓ Upload/Attach files and documents to each episode
- ✓ Record Follow Ups and Completions
- ✓ Store Related Medical Information
- ✓ Schedule Callbacks and Client Activity

Sessions

- ✓ Record multiple sessions per episode of care
- ✓ View History & Access Details

Appointments

- ✓ Record multiple appointments per session
- ✓ View Appointment Calendar

Medication & Vouchers

- ✓ Record recommended medications at a session level
- ✓ Issue Vouchers

Vapes

- ✓ Vouchers for Vapes and external Vape providers
- ✓ Digest screen for central Vape providers

Admin and Audit

- ✓ System Admin, User Management, Access Control
- ✓ Full Auditing, Patient Access Audit, Messages Audit

Optional Modules

SMS Messaging

- ❖ Send customised SMS messages to clients
- ❖ Automated SMS and bulk messaging facility
- ❖ Automated SMS Survey
- ❖ Automated SMS Referral Acknowledgement
- ❖ Text tagging (automated update based on response)

Payment Reporting

- ❖ Detailed and summary reports, invoice generation
- ❖ Payment structures for different settings/types

Pharmacotherapy Vouchers

- ❖ Generate Medication Vouchers
- ❖ Pharmacies enter voucher code onto the system
- ❖ Pharmacy Reimbursement reports

Functional Modules

- ❖ E-Voucher Paperless Pharmacotherapy Vouchers
- ❖ Direct Vape Provider Integration
- ❖ CO Monitor Management Module
- ❖ Stock Control Module
- ❖ Harm Reduction Module
- ❖ Advisor Chat/Messaging Module
- ❖ Direct NHS.net Medication request
- ❖ Documents Repository
- ❖ Enhanced Appointments Module
- ❖ Additional Behavioural Support Pathway

Bespoke Work

- ❖ Bespoke Development/Consultancy Options
- ❖ Multiple questionnaires can be added and tools such as BMI calculation can easily be applied
- ❖ Full consultation with the service and tweak and tailor the system accordingly

1.2 HealthManager Pathways

Below are the Standard Pathways offered with HealthManager as per the HealthManager Pricing document.

Bespoke Pathways can also be created to match the customers' requirements.

1.2.1 Smoking Cessation

The Smoking Cessation pathway in HealthManager is an Episode-of-Care-based structured support programme, covering the patient journey from initial referral all the way through 4- and 12-week validated quit outcomes.

It is built on the long-established QuitManager model and includes full NHS Digital reporting, medication/vaping support, and optional advanced modules.

A detailed description of the Smoking Cessation Pathway can be found in Section 1.3

1.2.2 Adult Weight Management (AWM)

The AWM pathway is designed to support adults (18+) with higher BMI values through structured weight-management interventions. The pathway uses Episodes of Care, Session structure, assessment tools, and eligibility triage to ensure consistent delivery.

HealthManager supports a multi-session programme:

- Initial Consultation / Session 1
- Core programme sessions (2–12)
- Maintenance Sessions (1–9)

Some local implementations run a 12-week structured programme plus maintenance.

An Adult Weight Management Episode of Care includes extensive health, behavioural, and progress data.

Core fields captured across sessions include:

- Height, weight, BMI (auto-calculated)
- Waist circumference
- Motivation score (1–10)
- Attendance records, DNA tracking
- Goal-setting (achieved / partially achieved / not met)

- Dietary and lifestyle prompts
- Signposting (internal & external services)

Optional / Local-Authority-specific fields may include:

- Challenges & barriers
- GPPAQ (physical activity)
- Body composition uploads

1.2.3 Children's Weight Management

The Children's Weight Management pathway supports children and young people who are overweight or obese by providing structured, family-centred interventions.

Unlike the Adult WM pathway, this model incorporates parental involvement, paediatric-appropriate measures (centile charts, Z-scores), extended follow-up windows, and group-based programme delivery.

1.2.4 Combined Adult and Children's Weight Management

A combination of the Adult and Children's Weight Management Pathways.

1.2.5 Physical Activity

The pathway is designed to support structured physical-activity interventions and enables advisors to track progress across clearly separated stages.

Physical Wellbeing Measures

- Single-Item Measure (SIM) — captured at *start*, *middle*, *end*, and *6-month follow-up*.
- GPPAQ (General Practice Physical Activity Questionnaire) — recorded at *first* and *last* session.

Engagement & Behavioural Measures

- Attendance / number of sessions attended
- Motivation & confidence scales (1–10) — at *start* and *end*, including importance rating
- Goal-setting outcomes (achieved / partially achieved / not met)

- Signposting or external referrals

1.2.6 Exercise Referral

Designed to support inactive clients with chronic health conditions the pathway operates in a similar structured manner to the Physical Activity pathway. The programme follows a 12-week supervised and personalised exercise plan, following eligibility assessment criteria.

Goal setting and outcomes are recorded and baseline and exit assessments are used as monitoring metrics. 12-week, six month and 52 week follow-ups are included.

1.2.7 Lifestyle

The lifestyle module is structured around the NHS Health Trainer focusing on assessing clients' lifestyles and wellbeing and allowing for goal setting and action plans for improving health and wellbeing. The most fluid of the standard modules available on the system, multiple standard assessments and questionnaires can be applied allowing the user and client to set goals and manage areas of focus.

Sessions include:

- Body metrics and measurements
- Weekly and short-term goal setting and progress
- Overarching goal monitoring and tracking

The module includes initial and exist assessments and includes signposting or external referrals for additional support/services.

1.2.8 Health Checks

The HealthManager "Health Checks" pathway provides:

- A single-session, structured NHS Health Check workflow
- Built-in reporting & export functions
- Consistent implementation across multiple local authority projects
- Full alignment with NHS Health Check dataset requirements (BMI, BP, AUDIT, QRisk, etc.)

Core fields captured across sessions include:

- Age

- Gender
- Smoking status
- Family history of CHD
- Ethnicity
- BMI
- Cholesterol level
- Blood pressure
- Physical activity level
- AUDIT score
- Cardiovascular risk score (e.g., QRisk)

Outcomes and reports can be generated to pass back to the clients registered Practice.

1.2.9 Drug and Alcohol

The HealthManager platform supports a configurable Drug and Alcohol pathway, designed to assess, monitor and support individuals with alcohol-related or substance-related risk factors.

HealthManager captures standardised alcohol screening data, including:

- AUDIT-C scoring (automated calculation)
- Frequency of alcohol consumption
- Units consumed on a typical drinking day
- Frequency of heavy drinking episodes
- Motivation/confidence scoring (1–10) pre- and post-programme
- Goal setting with outcome tracking (achieved / partially achieved / not met)
- BMI capture for understanding alcohol's impact on weight
- Ability to upload drink diaries or supporting documents
- Signposting to internal or external services

1.2.10 Diabetes Prevention

Focusing on lifestyle, diet and weight management the diabetes prevention pathway follows a structured sessional programme running up to nine months featuring regular sessions and additional follow ups. The pathway includes all the functionality and metrics from the weight loss pathway alongside lifestyle and behavioral goal setting. Eligibility criteria and triage assessments allow for the capture of Hb1Ac results.

Initial and final assessments include:

- BMI
- Central Adiposity
- Diabetes Risk Score
- GPPAQ
- SWEMWBS
- Audit-C
- Healthy Eating

Baseline, engagement and final follow up reporting is provided along with feedback surveys monitoring progress, and allowing evaluation for success within differing demographics.

1.2.11 Social Prescribing

A structured 12 week programme focussing around a client's wellbeing. Goal setting and attendance along with signposting and referrals. A streamlined version of the Lifestyle module incorporating signposting and onward referrals.

Wellbeing questionnaires are utilised as baseline and final metrics for success, along with signposting and referral outcomes, along with participation demographics.

1.2.12 Falls Prevention

Falls Prevention is a multi-session programme, generally operating like other HealthManager multi-week interventions.

Core fields captured include:

- Session attendance
- Client confidence levels
- Likelihood of suffering falls
- Interventions put in place
- Progress over the episode of care

1.2.13 Bespoke Pathways

Bespoke Pathways can be created to match the customers' requirements defined and quoted against the daily development rate.

1.3 Key Functionality/Core Modules

All the Core Module functionality is available as part of the Standard HealthManager application.

Below is a description of the Key functionality using the Smoking Cessation Pathway as an example. A similar cycle of Episodes, Sessions, Appointments and Goal Setting takes place for each Pathway, allowing for baseline assessments, and structured follow ups for comparison.

1.3.1 General Case Management

The application has a core patient record, and against this record there can be multiple episodes of care (quit attempts, or support episodes if the episode is harm reduction). Only one active episode of care is generally permitted at any one time, and episodes must be closed to allow for new ones to be started.

Within each episode there is the facility to record multiple contacts/interactions/sessions along with all the notes, medications and progress. An episode is carried out at or assigned to a clinic, and each clinic can have multiple advisors assigned. Only those with the relevant permissions will then be able to view the information.

A full admin area is available, allowing core team users or admins to manage and maintain user accounts, access rights and permissions.

The admin area also allows control of clinics and groups allowing the service to have full control of the application moving forward.

The application can be configured to allow for geographical location grouping, and clustering allows clinics to easily be grouped together for reporting purposes, and for ease of access.

The application is linear and wizard based, making it straightforward for an advisor to follow through a complete episode of care.

1.3.2 Pre-Quit Assessment

Brief advice, pre-episode contacts, and updates can be recorded as part of a referral, and then once the patient commits an episode of care can be created.

The patients interactions and sessions are then captured in a linear fashion, and the service can define when the application will need a quit date (or bypass it if harm reduction) setting to proceed. Some services allow two sessions to be recorded, some have no restriction, and some have a restriction that a quit date must be set at episode creation.

The application has an “about you” and “smoking history” section for each episode, allowing for the capture of medical conditions and warning for potential medication contraindications.

Once a quit date is set, the application sets a reminder for 25 days from that date to carry out a four week follow up, and there are numerous flags and notifiers when dates are put in for interactions to ensure the advisor knows when the valid four week follow up is.

The CO reading can be captured and validated at each session, along with at referral and episode creation (if required). Medication recommendations (and issue if direct supply) can also be captured at session level, and the medications available are controlled and configured by the system admin, to ensure only relevant products are chosen.

1.3.3 Quit Date Meeting

The quit date assessment is treated as any other session, but the advisor is prompted to populate a quit date (if configured as such). If there is no restriction applied to the application, it will ask the advisor if they wish to record a quit date at the start of recording each interaction/session.

The session screen is wizard based and allows for the capture of the CO reading, and there is also the ability to record numerous notes and comments. Each session is then summarised on a single screen so an advisor can easily have an overview of the history and see of any concerns from previous sessions.

The application also has a call back facility which allows advisors to flag reminders or notes against a patients episodes of care, these can also be assigned to other advisors (who have access to the client). So, if there was a high-risk situation such as a “party” a call back can be set to perhaps give the patient a call and follow up to check they have coped well before their next session.

1.3.4 Post Quit Date Meeting

As with all other sessions, it is the same wizard-based process, allowing for all data capture and updates to the client’s record. The application can be configured to allow for only a certain number of sessions, or it can be allowed to continue as needed, and all interactions and summaries are shown in chronological order.

The application responds to the dates recorded against the session, so it will flag and show when follow ups are relevant, allowing for a fluid yet managed quit attempt.

Appointments can be booked and scheduled, but the application allows for ad hoc interactions and sessions as standard, and the appointment module does not have to be used to be able to record sessions.

1.3.5 Final Quit Meeting

If the session falls within the 25-42 days from quit date range, the session page will ask whether the advisor would like to class this session as the four week follow up. Whatever responses to the patients quit status and co readings are given would then be applied and recorded against the four-week follow-up and automatically populate through to the NHS Digital return.

The application can continue through to 12 weeks (and beyond) too for services who are offering extended support, with the application also responding to the dates for this 12 week. Once a client has completed their episode of care, the advisor can then mark the episode as complete.

For patients that may drop out or be difficult to contact, the application can also flag up those who have yet to have their four week follow up recorded, and this can then be captured over the phone. It is designed to help retain those that may otherwise drop out of the service because they have perhaps quit and didn't think they needed to come back. It also helps recycle back, those who have relapsed.

1.3.6 Appointment Bookings and Management

If a clinic has been marked as available for appointment timeslots, then clients can be booked in and visually represented as a tile on the clinic and/or advisor calendar. Advisors can view individual clinic calendars or their overall schedule for the week.

Appointments can be booked by using the visual representation and dragging and dropping appointments onto different days or clinics. The calendar shows when there are already appointments booked and when slots are free. Each appointment is created as a "session that hasn't yet taken place" and hence all the required session information and progress can then be recorded against the appointment.

The calendar can flag for clashes and can allow multiple bookings within a specific time slot. A group does not require a calendar as it is generally at the same time, and this is configured within the admin section. Limits can then be set for the number of members along with start and end times and cut off dates.

The application can automatically send out SMS reminders for appointments, also if a client DNA's an appointment a further message can be sent via SMS also.

When initially booking in a client, the application can locate the nearest clinics based upon their home (or work postcode) to help locate a suitable venue. Appointments can be booked against different venues if needed.

The appointments booking system has easy drag and drop capability, but a simplified version can also be accessed via drop down selection.

1.3.7 Medication and Voucher Management

The application allows for the recording of recommended medications at a session level, along with the ability to record or issue a voucher. This can be by an autogenerated unique identifier, or a code from a voucher pad. The voucher code can also be issued via an SMS to the patient to cut down on paper, or via email. The voucher can also be sent directly to a selected pharmacy. The voucher can then be redeemed at pharmacies who will have visibility of the medication recommended. The pharmacy can then issue different medication (if allowed) and this will be recorded against the episode/session. The advisor will then have full visibility of this outcome.

Pharmacies may also wish to decline to issue medication or in the case of a PGD clinical checks can also be carried out. All information will be recorded and stored against the episode.

Once a voucher has been redeemed, the application will not allow this to be used again, to stop fraud.

The medication lists are configured via the administration area, along with costs. This way the service can restrict which medications they are offering to ensure costs are managed.

The voucher module also allows for cost reporting per outcome and area/clinic, allowing for services to monitor their spend on not quits and analyse for example whether particularly expensive medications are being issued without the desired quit results.

1.3.8 Vapes

The application can also issue separate vouchers for Vapes and external Vape providers in the same manner as the pharmacotherapy vouchers. These can be issued alongside standard NRT vouchers or independently.

The application can also provide a pick list and digest screen for central Vape providers allowing them to bulk process, record tracking numbers and mark the medications as issued in one action. It also provides a detailed export that can capture SKUs for upload into their own system to minimise any margin for error and manage stock.

1.3.9 Reporting

As part of the annual licence, we ensure the latest NHS Digital return is available and generated by HealthManager. Any additional requirements from NHS digital are also applied to the core application when required.

There are over a hundred reports available within the application, and we offer a bespoke development to apply service specific KPI reports.

Reports can be generated based on Local Authority, Clinic, Service Type, Provider, Locality, Ward, Post Code including deprivation reporting to name but a few.

We provide NHS Digital style local outcome reports, service outcome reports, organisation reports, advisor reports, SMS usage reporting, cost reporting, medication and voucher reporting, reimbursement reports, activity payment reports, referral reports and on top of this the application also has a query builder to allow users to create their own custom output based on their own selection criteria.

For secondary care models, PLD reporting can also be enabled.

Reports are restricted to ensure that only users with the correct permissions and can view the data, and advisors can only access reports based on clinics they are assigned to.

We also offer commissioner level access which allows for reporting without having any patient identifiable data visible.

1.3.10 User Management

By default, the application has multiple roles available, namely:

- Super User
- Administrator
- User
- Reporter
- Advisor

Within these roles additional permissions can be defined on an individual basis.

The application can be configured to restrict access to patient identifiable data, allowing for reporting on anonymised data at commissioner level.

Users cannot delete their account data.

If a user is unable to remember their password they can request, through a link on the login page of the HealthManager web portal, that a password reset link is emailed to their registered email address.

The user would need to enter their HealthManager username to request this. The user will then be able to click the emailed link and enter a new password for their account.

If the user enters an incorrect password 3 or more times in a row, the account will be blocked, and an admin user will need to be contacted to reactivate the account. It is not possible for the user to 'self-reset' in this situation for security reasons. The number of incorrect attempts can be set as required.

The required complexity rules can be set by the application administrator.

The application has the option of having two factor authentication applied.

1.3.11 Auditing

HealthManager has comprehensive auditing built in. This ensures we can easily track who is making changes to records. This includes Login ID and Timestamps.

All application access and changes to data are audited. This data can be retained indefinitely or for a requested timescale.

Should a rogue user maliciously damage data, the above process would allow us to recover the data, and the audit tools would allow us to identify who was involved.

This has been used on a number of occasions to support NHS Fraud investigations.

1.3.12 Referrals

Full referrals lifecycle data capture and reporting allowing referrals to be tracked from the source, and outcomes fed back. Referrals can be drilled down and reported on to four levels (e.g., Specific Hospital, Department, Ward, Referring Individual). The referrals module can also be integrated into the National Referral System, allowing referrals to be pushed directly from secondary care EPR/PAS into HealthManager. The service may also set up and manage referral access, allowing users to refer directly into their HealthManager Deployment.

Full reporting is also included as well as Referral Export functionality and feedback reports detailing progress of referrals to referring organisations.

This Module, while optional in the QuitManager Application, is a Core part of HealthManager

1.4 Optional Functionality/Services

All the optional functionality is available as per the HealthManager Pricing document.

1.4.1 Data Migration

Data can be imported into HealthManager. The format is agreed and defined, and scripts are written to pull the data through.

1.4.2 SMS Messaging Module

Allows the users to send and receive SMS messages through the application (all audited and attached to the client's episode). Messages can be templated, and restricted or free text allowed. The application has "merge" functionality to pull through key data fields into the messages. Bulk messaging is also permitted, with added functionality of pulling queries from the export and sending messages to the resulting output (e.g., all patients who set a quit date in Q1, who are lost to follow up)

1.4.3 Automated Messaging

Service rule defined messages, whether it be appointment reminders, DNA messages or even motivational messages based upon the likes of quit rates. Defined logic is required and to be agreed for each message (e.g., appointment reminder sent 24 hours (at a specific time range) prior to an appointment)

1.4.4 Automated SMS Referral Acknowledgement

Automatically sends service defined message acknowledging the referral to the client and informing them an advisor will be in touch (providing consent is received) and allows for the client to respond and opt out to close the referral.

1.4.5 Automated SMS Survey

Upon marking an episode complete an automated (service defined and managed) SMS survey can be triggered, providing the patient has given consent.

1.4.6 Text Tagging

Allows for service defined messages to be sent to clients and expect a response from the message that would update the client's episode and follow up.

1.4.7 External basic referral form for external websites

A JavaScript snippet that sits on the services own website that captures basic contact information that pushes directly into the HealthManager referrals module. Saving any copy and paste of emails and manual intervention

1.4.8 External advanced referral form for external websites (multi pathway & configuration)

Extended version of the basic referral form that incorporates more comprehensive data capture and sensitive information (if required) also can capture referral pathway information and dynamically pull referring organizational information and professional referral data configured within the HealthManager admin area.

1.4.9 Payment Reporting Module

Detailed and summary reports, and invoice generation if required for targeted payments. Admin configurable matrices to allow for different payment structures for different settings/types. Standard includes initial assessment and follow ups. Specific targeted groups can also be considered (e.g., Ethnic minorities, deprivation and IMD rank specific payments)

1.4.10 Pharmacotherapy Voucher Module (Smoking Cessation Pathway)

Medication Voucher Module, allowing advisors to generate a voucher and pharmacies enter the voucher code onto the application. The application shows which medication is requested and updates the client record accordingly. Full audit trail, and medication reimbursement reports included. Specifically designed for smoking cessation.

1.4.11 E-Voucher Module

As above but paperless, allowing for a code to be generated and sent via SMS to the patient (or email to pharmacy). The patient can then show the code at any participating pharmacy. The medication requested is shown and the pharmacy can dispense, or decline, or even amend should the service allow. Pharmacy clinical checks are also available and CO monitoring. SMS Module is required.

1.4.12 Direct Vape Provider Integration (Smoking Cessation Pathway)

As with the e-Voucher for pharmacies, this can also be applied to Vape Providers and will allow central providers to access request lists and mark the vapes as having been issued. It also allows for a standard export for uploading to their own system.

1.4.13 PGD Module (Smoking Cessation Pathway)

Allows for advisors to carry out and record assessment and validation checks against a client before requesting medication from a contracted Pharmacist. The Pharmacist can then carry out the clinical check and establish suitability for the medication prior to dispense. The module incorporates payment reporting including dispense and clinical assessment payments as well as medication reimbursement.

1.4.14 Prescriber Module (Smoking Cessation Pathway)

Direct notification to a defined prescriber for medication requests from an advisor. This allows for clinical assessment and update of the record by the central prescriber along with advisor notifications of outcomes and suitability and order tracking and audit.

1.4.15 CO Monitor Management Module (Smoking Cessation Pathway)

Allows for the management of CO monitors, allows for the assignment to advisors, or clinics, and flags and reminds of when recalibration is required. Report included.

1.4.16 Stock Control Module

Full stock control and dynamic picking functionality for centrally held medication, including postage label generation if required.

1.4.17 Enhanced Appointments Module

Calendar based drag and drop platform for clients' appointments and groups, allowing for multi clinic/advisor view. Dynamic and context menu-based updates and automatic SMS notifications based upon consent and outcomes. iCal subscription compliant

1.4.18 Harm Reduction Module (Smoking Cessation Pathway)

Allows patients to be supported through a quit attempt on a harm reduction basis.

Includes tobacco consumption/reduction functionality and milestone reporting in accordance with NICE guidelines.

1.4.19 Advisor Chat/Messaging Module

Allows for pop up chat between logged on advisors as well as group messaging within logged on advisors. Permission based.

1.4.20 Direct NHS.net Medication request

Automatically generates and sends a secure email to specified destination or GP for a medication/prescription request. Can be utilised for prescription requests to the patient's surgery, or to a central location if medication is direct supply.

1.4.21 Automatic outcome GP update via NHS.Net

Automated letter generation and attachment upon episode completion allowing a secure email and letter to be sent to the client's registered practice notifying them of the quit attempt outcome and/or any medications issued.

1.4.22 Patient Associated Files Upload

Allows for users to upload files/documents to a patient's record/episode of care.

1.4.23 Documents Repository

Accessible via a navigational icon, this allows for a service to upload documents/resources to a central location for any logged in user to access.

1.4.24 Visual Reporting Dashboard

A dynamic reporting area showing visual and up to the second charts for 15 key reporting elements.

1.4.25 Additional Letters

Allows for a further 5 letters to be added to the application above the standard five for the basic implementation. Service defined (e.g., Midwife Update for Maternity, LTFU, GP Outcome, DNA, Unable to Contact)

1.4.26 EMIS Importer Module (Smoking Cessation Pathway)

Allows for a manual upload of patient information, from a pre-defined EMIS output template. Data covers information required for NHS Digital return.

1.4.27 PharmOutcomes Importer (Smoking Cessation Pathway)

As with EMIS importer, manual upload functionality of data extracted from PharmOutcomes for the purpose of populating the NHS Digital return. PharmOutcomes involvement may be required for defining export template.

1.4.28 Bespoke Development/Consultancy

The application is highly configurable, and with our vast experience we have developed numerous additional features and data capture for the application, from holistic assessments to alcohol interventions. Multiple questionnaires can be added and tools such as BMI calculation can easily be applied. The application is designed to function to make the service run effectively and efficiently. We can consult with the service to define and tailor the application accordingly. All development costs include project management and testing.

1.5 Core Application Information

The Core application is a fully functioning HealthManager deployment which covers all the required data capture and reporting for the NHS Digital submission for smoking cessation.

Each implementation has two sites created, a live and acceptance site. The acceptance site for approving the application and user acceptance testing prior to any transfer to live, and to be utilised as a safe training environment.

Complying with NICE guidelines for smoking cessation the application allows for the following:

- Patient Creation/Amendment
- Episode Creation/Amendment
- Session Creation/Amendment (no limit on sessions)
- Pharmacotherapy Assignment/Capture
- Fagerstrom Data Capture
- Medical Conditions Data Capture

- 5 Service defined letters (including medication requests)
- 4,12,26 and 52 week follow up recording and call back reminders
- “My Clients” caseload management.
- Appointment calendar
- Call Back/Reminder Functionality
- Admin Area
 - Manage Users
 - Manage Clinics
 - Manage Medication Formulary
 - News/Announcement Management
 - Reference/Lookup data management
- Reports
 - NHS Digital Return (smoking cessation)
 - NHS Digital Validation Report
 - Monthly NHS Digital Monitoring
 - Service/Intervention Type/Clinic Outcome Reports (detailed and summary; outcome, demographic and access data)
 - Medication Cost reporting (Report against clinics and outcomes)
 - DNA Report
 - Advisor Reporting
 - Post Code/Ward Reporting
 - Pregnancy Reporting
 - Activity Outcome Report
 - Audit Report
 - Data Export (Query Builder for extracting custom raw data in csv format)

1.6 Secondary Care/Trust/Maternity Implementation

The Secondary Care/Trust/Maternity level deployment is as above but also incorporates data collation and capture for complying with the Long-Term Plan and allowing for reporting to the Strategic Data Collection Service for the delivery of tobacco dependence treatment.

This version can also work with community HealthManager deployments for onward referral data transfer and outcome updates. For onward referral to non HealthManager services secure email can be used.

1.7 Road Maps

In addition to the functionality currently available within the application, there are a number of workstreams continuing to ensure the application is constantly progressing:

- Personal Demographic Service integration. Currently running through the onboarding process with NHS Digital
- NHS Staff/Workforce Support
- Advance Pharmacy Program compatibility
- National Referral System reporting integration (feeding back outcomes automatically)
- Maternity software service direct integration

1.8 Onboarding and Offboarding

For onboarding we include a training plan as part of the package. The training is a “train the trainer” approach designed to be cascaded down and is broken down into different sessions for the different user types. Training can be delivered virtually via MS Teams or can be delivered on site. User guides and training manuals are provided, and additional training days beyond the initial package can be purchased. An initial familiarisation training session is also provided ensuring the services are comfortable using and testing the application prior to any deployment.

Full documentation is provided as required.

In an end-of-contract situation, the application allows for full data extraction. This allows users with the correct access levels to extract the data in a zipped file format. The data would then be presented in a series of csv files within the zip. On top of this a full database backup is provided with the proprietary logic and functionality removed

At the end of the contract the data is handed back to the data owner with the service being able to run their own extracts. A backup database is also provided. Once the data has been returned and receipt acknowledged we will securely erase all data we held for the service. At

the end of the contract should the service wish to keep the site up and running with the data for extraction or validation purposes extensions can be purchased at a monthly rate.

1.9 Support and Availability

Support is standard as part of the licence, with access to the support desk via phone or email, or ticketing portal if required. The support desk is available 9:00 to 17:30 Monday to Friday. An account manager is assigned for each customer/HealthManager deployment

Our service hosting provider provides a 100% network uptime guarantee and a 1-hour hardware replacement.

All our upgrades are performed out of working hours, and the service will be notified prior to the upgrade taking place.

In the last 6 years of hosting with Rackspace we can confirm have met a minimum of 99.9% uptime for our applications in working hours.

1.10 Change Management

Bionical Solutions operate a comprehensive change management process and any changes made to applications will be fully communicated in a timely and complete manner. These include testing, patching, updates, and upgrades

2. Service Technical Definition

2.1 Technical Requirements

The solution is fully web-based and as such there are no minimum requirements other than a web browser and an internet connection.

Supported browsers.

- Microsoft Edge
- Firefox
- Chrome
- Safari
- Opera

2.2 Disaster Recovery, Backup and Restore

Bionical Solutions' Disaster Recovery Plan provides a comprehensive solution for regaining access and functionality in the instance of events such as natural disaster, cyber-attack, or other emergencies.

Key to this Disaster Recovery Plan is a complete backup and restoration process.

All data stored on our servers is backed up at hourly intervals. We can restore from any of these hourly snapshots from the previous 49 hours. Beyond that we can restore a daily backup for the previous 9 days. Weekly backups would be available beyond this point.

Bionical use Rackspace (www.rackspace.co.uk) to host data. Multiple levels of security are employed to ensure that the data we store here is safe. Should a total disaster wipe out the Rackspace datacenter, we have facilities within other data centers where we could rebuild the server environment.

Bionical uses Redcentric (www.redcentricplc.com) to store weekly backups for disaster recovery purposes. The data is compressed and encrypted before being transferred to the Redcentric servers on a weekly basis. Redcentric are accredited to store HM Government "Restricted" data and are also compliant with the NHS Digital Information Governance Statement of Compliance (IGSoC). They are a trusted NHS Digital partner.

Loss of equipment through hardware failure is covered in our Disaster Recovery Plan.

This plan is reviewed periodically to ensure best practice and tested annually.

2.3 Security and Standards Accreditation

2.3.1 Cyber Essentials/+

The HealthManager solution is fully Cyber Essentials certificated.

2.3.2 NHS Digital Information Governance Toolkit

Bionical is registered as a Commercial Third Party and submits annual updates to the NHS Digital IG Toolkit a commercial third party. Our current toolkit status can be found here:

<https://www.igt.hscic.gov.uk/reportsnew.aspx>

Click on 'Assessment Reports', enter an organisation type of 'Commercial Third Party' and our organisation code of '8HK77'

2.3.3 ISO 9001-Quality Management System

Bionical is ISO 9001: 2015 accredited for the delivery of online solutions. Our business systems have been judged to be robust, demonstrate traceability and are geared towards measuring and maintaining an evolving and consistently high-quality service.

Certificate number: 14129997

2.3.4 ISO 27001 -Information Security Management System

Bionical is ISO 27001: 2013 accredited for the delivery of online solutions. Our Information Security Management System (ISMS) provides a systematic approach to managing sensitive information and ensuring it remains secure. It encompasses people, processes and IT systems and includes robust business continuity planning.

Certificate number: 14125915

2.3.5 Data Protection Act 1998

Bionical is registered under the Data Protection Act (<https://ico.org.uk/esdwebpages/search> Registration Number: Z9686444).

Access to the solution by Bionical staff is controlled by technical and physical controls. Bionical employees that have access to the solution have signed a security document confirming they have been briefed on, and understand the principals of the Data Protection Act:

- Personal data shall be processed fairly and lawfully and subject to conditions.
- Personal data shall be obtained for specified and lawful purposes and not further processed in any manner incompatible with that purpose.
- Personal data shall be adequate relevant and not excessive for the purpose
- Personal data shall be accurate and where necessary, kept up to date.
- Personal data shall not be kept for longer than necessary for the purpose.
- Personal data shall be processed in accordance with the rights of the data subjects.
- Bionical is committed to implementing appropriate security to prevent unauthorised or unlawful processing or accidental loss or destruction of, or damage to the data.

Any request for access to data/information under the Subject Access provisions of the Data Protection Act 1998 will remain the responsibility of the service commissioning the solution. Any such request being made to Bionical would be notified immediately to the Information management Department at the commissioning service.

2.3.6 Computer Misuse Act 1990

Bionical employees are made aware that the Computer Misuse Act is legislation that has created offences for which unauthorised access to or modification of computer data may result in criminal prosecutions. Bionical employees with access to the solution have signed a security document confirming they must only access the systems, databases or networks to which they have been specifically authorised to do so. They must also report any suspected attempts or unauthorised access by others to information or data held by Bionical.

2.3.7 Copyright, and Designs & Patents Act

The HealthManager, QuitManager, Schemes Manager and NRS solutions all comply with the Copyright, and Designs & Patents Act.