



Proquiro Adult Social Care Referrals Management System

Service Definition Document

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Company Overview

Master Software Solutions Ltd. brings a fresh, agile approach to web development, dedicated to helping public sector organisations work smarter and more efficiently. With over a decade of hands-on experience, our team understands the everyday challenges faced by school staff—which is why we created Proquro, a platform built to make your job easier from start to finish.

We know that every organisation is unique, and as a micro-organisation ourselves, we ensure our services are always affordable and tailored to your needs. Our lean structure means you get great value without compromising on quality. We're passionate about forming lasting relationships and making advanced solutions accessible, so you can focus on delivering real results for your community.

Proquro Platform Overview

Introducing Proquro—an intelligent, joined-up platform for Adult Social Care referral management and placement sourcing. Designed for contracting authorities and their care provider markets, Proquro streamlines how teams identify needs, source provision, and award contracts. From first referral through to contract offer and ongoing review, the platform brings structure and clarity to brokerage, market engagement, and provider management—so no person is left waiting.

Proquro supports a needs-led, outcomes-focused approach. Brokerage teams create a single referral record that captures needs, risks, preferences, and context. Using standardised RFQ templates, authorities can issue requests for quote to their preferred provider lists in a few clicks. Providers submit their quotes securely—covering rates, capacity, start dates, and service details—so decision-makers can compare like-for-like and select the most suitable provider with full evidence and auditability.

What sets Proquro apart is its flexibility and control. Authorities can configure preferred provider lists by service type, geography, tiering, or accreditation; tailor workflows, thresholds, and SLAs; and automate reminders and escalations. Management tools track responses, shortlists, clarifications, and acceptance/declines, then generate a contract offer to the chosen provider—maintaining clear accountability and a transparent audit trail throughout.

Proquro keeps everything organised and compliant. All records, documents, quotes, and actions are securely stored with end-to-end audit trails, supporting fair market engagement, information governance, and assurance needs. Dashboards and reporting provide real-time visibility of demand, response times, market capacity, costs, and

outcomes—helping leaders manage pressure, optimise commissioning, and plan resources.

With a modular design, Proquro adapts to your service without unnecessary complexity. Add the DoLS module to enable care providers to submit and track Deprivation of Liberty Safeguards applications in one place. Add the Invoicing module so providers can submit invoices directly to the council and finance teams can approve, reconcile, and monitor spend—giving you full visibility of expenditure across all clients in the reporting dashboards.

By bringing referrals, RFQs, provider engagement, and contract award together, Proquro helps authorities reduce time-to-placement, increase market coverage, improve transparency, and cut administrative burden—so people get the right support, at the right time, from the right provider.

Optional Add-ons

Supercharge your social care referrals and placement sourcing with Proquro’s optional add-ons. These enhancements extend your platform’s capabilities, driving greater efficiency and supporting your organisation as it grows. Choose the Proquro modules that best fit your organisation’s needs—individually or as part of a discounted bundle—and create a solution that maximises efficiency, compliance, and value. Our customer-centric approach ensures you only invest in the features you require, with the flexibility to adapt as your needs change.

Deprivation of Liberty Safeguards (DoLS)

Proquro’s DoLS (Deprivation of Liberty Safeguards) module streamlines the end-to-end process: care providers identify a DoLS need and submit applications well in advance using standard templates; requests are automatically routed to the contracting authority or a nominated DoLS agency for triage. Social workers and clinicians can log in to complete assessments, capture evidence and best-interest decisions, and provide a clear, role-based view of actions taken for the care provider, authority, and assigned practitioner. Assessors can publish calendars and availability, offer appointment slots, and manage tasks, while the same module enables them to invoice the council directly. With secure workflows, status tracking, reminders, and full audit trails, every case stays timely, compliant, and transparent.

AI Assisted Assessments

With Proquro’s AI Assisted Assessment, assessors can record their assessments by voice, allowing the system to instantly capture and summarise key details, then automatically complete the forms required for your records. This smart, streamlined

approach reduces paperwork, saves valuable time, and ensures that information is always accurate and up to date. By removing administrative barriers, your team can focus on what matters most—delivering high-quality support to each client. Every voice-recorded assessment is securely stored with a full audit trail, so you can meet compliance needs with confidence while providing an outstanding experience for both assessors and clients.

Analytics & Reporting

Proquro Reporting offers accessible tools for analysing, visualising, and sharing data, empowering informed decision-making. Pre-configured dashboards provide instant insights into your students, assessments, and intervention activities, while a custom dashboard is created to fit your organisation's additional needs. With a wide range of visualisation options and a secure, scalable architecture, your team can monitor key metrics and trends—adapting quickly to new business needs.

Third-Party Integrations

Proquro integrates effortlessly with the essential tools your school already uses, ensuring your student assessment and case management processes run smoothly from day one. Seamlessly connect with trusted platforms like DocuSign for eSignatures and SharePoint for secure document management, making it easy to keep all records organised and accessible.

For even greater impact, Proquro can be tailored to link directly with your school's Management Information System (MIS) or NHS services, streamlining referrals and supporting joined-up care for every student. Each integration is purpose-built to suit your setting, with expert guidance at every stage—so you can focus on delivering effective, personalised support where it's needed most.

Invoicing (Finance & Payments Integration)

Proquro's Invoicing module pairs seamlessly with referrals: care providers can submit invoices to the council at preferred intervals (e.g., weekly, monthly, or by milestone) using standardised templates, while configurable workflows route them for approval and reconciliation. When integrated with your finance system, invoices are pushed straight through for processing and, once paid, both the council and the provider receive automated notifications—giving everyone a transparent, real-time view of payment status and history. For DoLS applications, social workers and clinicians can raise invoices directly in the app and, with payment integration, receive funds straight to their bank accounts. With end-to-end audit trails, role-based permissions, and status tracking, the module drives efficiency, improves cash-flow visibility, and minimises administrative overhead without compromising compliance.

Key Benefits

- **Faster placements:** Issue RFQs to preferred provider lists in minutes and award contracts with clear audit trails.
- **Fair, transparent sourcing:** Compare like-for-like quotes and select the best provider with evidence-based decision-making.
- **Configured to local practice:** Tailor workflows, thresholds, SLAs, and provider lists by service type and geography.
- **Integrated invoicing & spend visibility:** Providers invoice at preferred intervals; finance integrations and dashboards show full spend across clients.
- **DoLS ready:** Early applications, routed to the right team; assessor calendars, status tracking, and embedded invoicing.
- **Reduced admin, improved collaboration:** Standard templates, automation, role-based access, and reminders keep cases moving.

Implementation (Onboarding)

The Proquro implementation is designed to make your onboarding experience as smooth and straightforward as possible. We configure your chosen modules and adapt the platform to your organisation's specific requirements, ensuring everything aligns perfectly from day one. User accounts are established with appropriate role-based access, and focused training sessions equip every team member to get up and running confidently.

Our implementation package covers every essential aspect of onboarding, guiding you through each typical stage: from initial discovery and requirements gathering, through system configuration to fit your organisation, user acceptance testing (UAT) to validate functionality, focused training sessions for your team, and finally, a smooth go-live transition. Throughout the process, responsibilities are clearly defined—our team manages all technical delivery, configuration, and data migration, while you provide timely access to necessary data and facilitate engagement with your stakeholders. Please note, onboarding costs are quoted separately based on your chosen features and requirements.

Project Management

You'll have a dedicated project manager as your main point of contact, coordinating delivery, hosting regular progress meetings, and ensuring open communication at every step. Timelines for onboarding are based on your chosen modules and specific requirements, with clear milestones agreed in advance so expectations are managed at every stage.

What's Included in the Implementation

Your implementation package covers everything you need for a smooth transition to Proquro:

- Complete configuration of selected modules
- Migration of data from legacy systems and initial data setup where required
- Onboarding of users with tailored access
- Focused user training sessions and supporting documentation
- Ongoing project management and regular progress reviews
- Technical support available throughout the implementation journey
- Post-launch review, warranty support, and a smooth transition to ongoing support services

Training

Proquro's training programme is designed to empower every user group—from standard users to system administrators—with confidence in the platform's features. Expect role-focused workshops, interactive demonstrations, and comprehensive user guides, all fitted to the practical needs of your organisation. Support doesn't stop after launch; our dedicated helpdesk, technical assistance, and regular system updates mean you're always covered. Continuous enablement is assured through refresher sessions and an online knowledge base, helping your teams stay up to speed as Proquro evolves.

Customer Support

Standard customer support is included within your annual licence fees and is aimed at resolving application faults, login difficulties, and access issues swiftly. For organisations seeking enhanced engagement, our premium support and advisory services go further, delivering proactive, hands-on guidance to help your teams maximise system performance. This includes management of users and roles, supplementary training sessions, updates to reports and dashboards, modifications to custom fields, bulk data updates, and scheduled quarterly review meetings to guarantee your solution continues to meet evolving organisational needs. Our team is always ready to assist with any queries or requests for system enhancements. Please note, support hours operate on a "use it or lose it" basis, with unused hours not transferrable to future periods.

All customer support is accessible via email, ensuring every request is promptly logged in our support system. Incoming support tickets are triaged and assigned a severity

level in line with our impact matrix, and progress updates or resolutions are delivered according to the service level matrix outlined in our standard terms and conditions.

Table 1: Service Level Matrix

Severity	Acknowledgement	Resolution
Urgent	1 business hour	4 business hours
High	4 business hours	12 business hours
Medium	2 business days	4 business days
Low	5 business days	10 business days

Table 2: Impact Matrix

Severity	Description
Urgent	The application is inoperable or a core function of the application is unavailable
High	A core function of the application is significantly impaired
Medium	A core function of the application is impaired, where the impairment does not constitute a serious issue; or a non-core function of the application is significantly impaired
Low	Any impairment of the application not falling into the above categories; and any cosmetic issue affecting the application

Hours of Operation

Support is available Monday to Friday, 9:00 AM–5:00 PM UK time, excluding UK Bank Holidays.

Location of Support

Support team is based in Reading, UK

System Updates and Upgrades

Routine system maintenance and upgrades are included in your annual licence fees, ensuring your solution remains up-to-date, reliable, and aligned with your organisation's needs.

All system updates and planned upgrades will be carried out outside of business hours, with the aim to provide at least two weeks' notice for any scheduled maintenance. In the event of emergency updates, these will also be performed outside of business hours, albeit with a shorter notice period where necessary.

Scalability

Scalability is at the heart of Proquro's design. As your organisation's requirements change and your ambitions grow, Proquro grows with you—no fuss, no disruption. Whether you need to add new users, adjust permissions, or request changes to your account setup, you can do so quickly and efficiently via intuitive admin controls or simple account management requests. These combined capabilities ensure your team always has the right tools on hand, keeping your processes running efficiently no matter how your needs evolve.

Change Management

A dedicated account manager will be assigned to you, providing regular meetings and acting as your main point of contact. Any configuration changes are managed through formal change requests, with a clear quote provided for approval. Once approved, our team will prioritise and deliver the changes, keeping you updated on progress throughout.

Data Protection and Compliance

Data Security Measures

Proquro places the highest priority on safeguarding all personal and sensitive data, implementing rigorous security measures throughout. These include routine security assessments, comprehensive encryption of data both while in transit and at rest, and robust access controls designed to prevent unauthorised access or data breaches.

Data is hosted securely on the Microsoft Azure platform, with the UK South Region as the primary storage location and the UK West Region designated for backup. We employ TLS encryption to protect data during transmission and storage, ensuring your information remains secure at every stage. Regular backups within Azure further support business continuity and the ongoing protection of your data.

Buyer-enabled services (e.g., DocuSign for eSignatures, Experian for supplier checks) are treated as sub-processors when activated. We maintain a living sub-processor list and provide prior notice of changes.

To uphold our security standards, annual vulnerability assessments (penetration testing) are performed by independent third-party specialists, with reports available upon request. Data remains securely stored within Proquro for the duration of your

contract. At contract completion, information is returned to the client in line with established exit procedures, and all residual data is promptly and securely erased from our systems, guaranteeing confidentiality and full compliance with data protection requirements.

GDPR and Data Protection

Master Software Solutions Ltd. is officially registered with the Information Commissioner's Office (ICO) as a data processor and holds Cyber Essentials Plus certification. The company has appointed a dedicated Data Protection Officer (DPO) to oversee all aspects of GDPR compliance. Additionally, every employee receives thorough training in data protection, ensuring a robust commitment to privacy is embedded throughout the organisation.

Exit Procedures

When concluding your service or offboarding from Proquro, a well-defined exit procedure is observed to facilitate a seamless transition and uphold the security of your data. All user accounts linked to your organisation will be promptly disabled, with platform access withdrawn as outlined in your contract. Clients are offered secure data export facilities, enabling safe retrieval of all information prior to the closure of accounts. Any remaining data will be thoroughly and securely erased from our systems in compliance with relevant data protection standards, and confirmation of deletion can be provided upon request. We recommend coordinating closely with our support team to agree timelines and ensure all offboarding requirements are comprehensively addressed.

Scope and Formats

Exports are supplied in JSON by default, with CSV available on request, to meet open, vendor-neutral handover needs and ensure compliance with data ownership and exportability requirements.

Document Export and Structure

All associated documents are exported in their native formats and organised in a deterministic folder hierarchy using Student Reference. A cross-reference file links each document to its metadata (version, type, effective dates) to preserve provenance and enable rapid ingestion by the successor solution.

Technical Architecture

Proquro operates as a multi-tenant, cloud-native SaaS platform hosted on Microsoft Azure in UK regions. The platform is accessed via a modern web browser over TLS, with identity handled through a segregated identity tenant and multi-factor authentication.

The core services are stateless and scale horizontally; documents are stored in durable object storage; transactional data is stored in a managed relational database; integrations are isolated in a secure integration tier; and reporting is delivered through read-optimised data access that does not impact production workloads.

Standards compliance and client environment

- HTML5 browser UI with responsive design for desktop/tablet/mobile; no plugins required.
- Supported browsers: Microsoft Edge (current) and Google Chrome (current). Other modern browsers may function on a best-efforts basis but are outside formal support scope.
- Strict TLS 1.2+ everywhere; authenticated SMTP relay with SPF/DKIM/DMARC for mail integrity.
- Designed to meet WCAG 2.1 AA; accessibility statement is available at <https://help.proquiro.co.uk/accessibility-statement/>

Resilience and redundancy

- **High availability:** The web tier is stateless and runs across multiple instances; ingress layers (Front Door, WAF) are redundant; storage and database services are platform-managed for SLA-backed availability.
- **Regional resilience:** Primary hosting is in **UK South** with disaster-recovery protections in **UK West**. Databases and object storage are configured with geo-redundant protection (geo-replicated backups for SQL; GRS for Blob).
- **Operational safeguards:** Health probes, auto-scale, and synthetic transactions detect and remediate service degradation. Release deployments include smoke tests and back-out checkpoints to avoid unnecessary downtime.
- **Availability target: 99.9%** service availability, with planned maintenance performed outside core working hours and change windows coordinated to avoid critical deadlines.
- **Disaster Recovery (RPO/RTO):** Hot-Cold DR strategy. Target RPO 30 minutes and RTO 24 hours under a declared disaster situation, supported by Azure backups and DR procedures.

Data backup, retention and archiving procedures

Backups

- **Azure SQL:** automated backups with point-in-time restore; daily full, differential and frequent log backups retained to meet contractual retention.

- **Azure Blob Storage:** versioning and soft-delete enabled; geo-redundant storage (GRS) protects against regional incidents.
- **Frequency & scope:** Daily backups with additional snapshots around major releases; integrity checks are verified and restoration is periodically tested.

Security, access control and information governance

- **Segregation & tenancy:** Each contracting authority's data is logically segregated with strict scoping at every access layer; supplier accounts are deduplicated and can participate across authorities without data leakage.
- **Access control:** Role-based permissions (e.g. - Key User/Administrator, Manager, Evaluator, Read-only) with configurable scopes at project/module level; MFA enforced.
- **Encryption:** Data in transit via TLS 1.2+; data at rest encrypted by platform keys; customer-managed keys can be supported if required.
- **Patching & hardening:** Platform and dependencies are kept in support; security updates follow a controlled, out-of-hours pipeline.
- **Logging & audit:** Every material action (publish, invitation, opt-in, score, moderation, award, notice) is written to an immutable audit timeline and exportable (CSV/PDF).
- **Email integrity:** Authenticated SMTP relay with SPF/DKIM/DMARC aligned to reduce spoofing.
- **Compliance:** UK GDPR aligned processing; ability to respond to data subject requests; test/sandbox environment provided for training; helpdesk SLAs and escalation procedures in place.

Contact Information

To schedule a demo, please contact info@mastersoftware.co.uk