

Heidi Health

Service Definition Document *Gcloud15*



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About Heidi

Heidi is a clinician-led AI platform that supports clinical documentation and related workflow tasks, helping clinicians reduce administrative burden. It is designed for enterprise use, enabling secure collaboration across teams and sites, with outputs configurable by specialty and organisational requirements. Integration is delivered through APIs and FHIR-aligned approaches, allowing adoption within existing digital environments without requiring changes to core clinical systems.

Heidi is designed to meet NHS expectations for information governance and clinical safety, with alignment to relevant national frameworks including DSPT and DCB0129, and UK-based hosting to support data residency and procurement requirements.

Heidi is used at scale across large, distributed clinical teams, supporting high-volume clinical activity and providing a stable, supportable platform suitable for public-sector deployment and long-term use.



Services Overview

Heidi is the NHS-ready ambient voice technology that's transforming how UK clinicians work across the entire healthcare ecosystem. It adapts to each clinician's voice, specialty, and documentation style to create authentic notes & documents that sound exactly like you - whether it's a 10-minute GP consultation or a 2-hour appointment.

Ambient Voice Transcription

Heidi continuously listens during a consultation and generates a real-time, time-stamped transcript that forms a single source of truth. From this transcript, Heidi produces formatted documentation and downstream artefacts: clinical notes, letters, referrals, tasks, and coding suggestions, immediately after the consultation. The workflow is designed for role-based review and sign-off, with both narrative and structured outputs written back to the EPR using open standards (FHIR/HL7) and Trust-approved integration patterns.

Heidi goes beyond basic transcription. It handles pre-consult admin by retrieving patient history and test results, real-time documentation during consultations, and automated referrals and follow-up tasks post visit. One conversation generates everything you need, regardless of consultation length. It works in any environment - low bandwidth in the ED using the app, or for paramedics and district nurses on home visits.

Features



Transcribe

Stay fully present with your patients. Heidi captures every detail of the conversation - even in busy clinics with multiple speakers or background noise - so you can focus on what matters most: the care you provide.

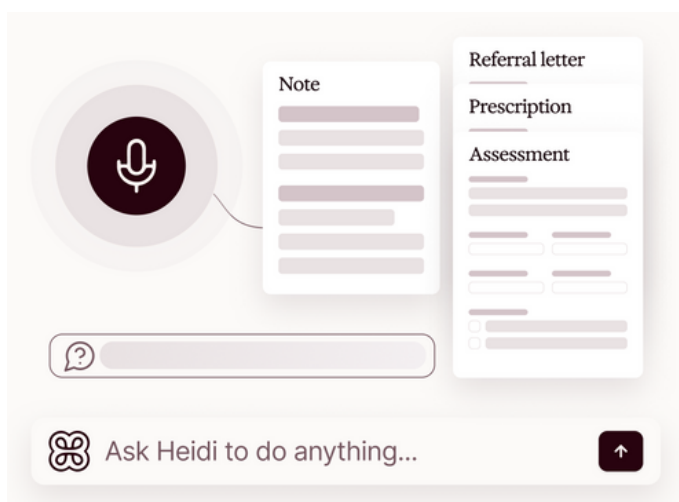
- + Capture consultations from 5 seconds to two hours on desktop or mobile.
- + Transcribe patient conversations in 110+ languages with automatic language detection.
- + Transcribe accurately in complex audio environments with loud ambient noise or multiple voices.



Dictate

Get professionally formatted, highly accurate clinical documentation instantly. Heidi transforms your natural speech into polished notes - complete with proper terminology and punctuation.

- + Dictate voice-to-text notes, procedure reports, and clinical documentation.
- + Transform conversational speech into full sentences by removing ums and ahs, adding punctuation, and converting colloquialisms into clinical terminology.
- + Create and use custom voice-activated shortcuts (Snippets) for insertion of common phrases into your notes.





Context



Build a complete clinical picture without disrupting your consultation. Heidi brings together everything you know about the patient. From previous notes to uploaded reports, supporting your informed decisions with all the context at your fingertips.

- + Upload files (PDF, DOC, JPG, PNG) and handwritten notes to provide more context and clinical information.
- + Link multiple patient sessions within context to connect previous notes and care plans to your current consultation.
- + Search for specific information using Ask Heidi without searching through the medical record.



Template



Document your way, every time. Heidi's templates let you create notes that match your preferred style and clinical requirements. Whether you're using specialty standards or your own format, your documentation stays consistent without extra effort.

- + Create custom templates in real time – build from scratch, convert a past note, or Ask Heidi to create one for you.
- + Match your language and workflow by adding placeholders, instructions, and standard phrasing to mirror your voice, formatting, syntax and flow.
- + Start from proven defaults: use clinical templates from Heidi or draw from what your community uses every day.



Preferred Language

Communicate naturally, document consistently. Speak with patients in whatever language you are fluent in, with Heidi being able to handle conversations in 110+ languages.

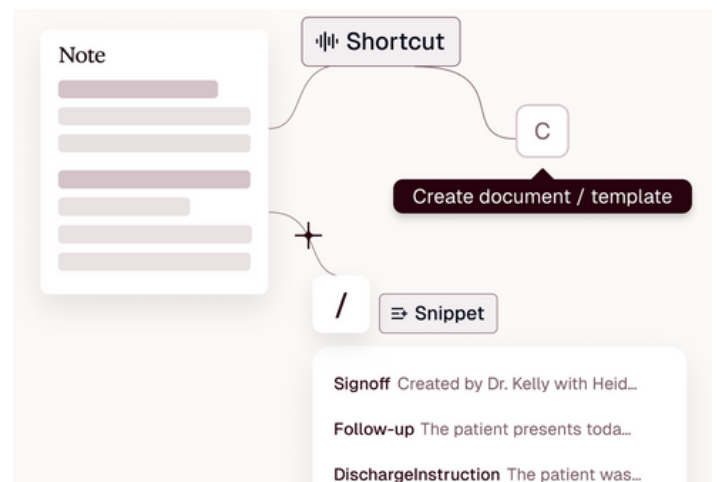
- + Handle multi-language conversations from 110+ languages, speaking multiple languages interchangeably within a single consult.
- + Select separate input/output languages, allowing patient communication in their preferred language whilst maintaining documentation in clinician's chosen language.
- + Pop-up box for clinician to confirm they are fluent in the language they have selected.



Customisation

Work the way you work best. Customise Heidi with your preferred terms, shortcuts, and text snippets so documentation flows naturally - reducing repetitive typing and keeping your notes accurate and consistent across every consultation.

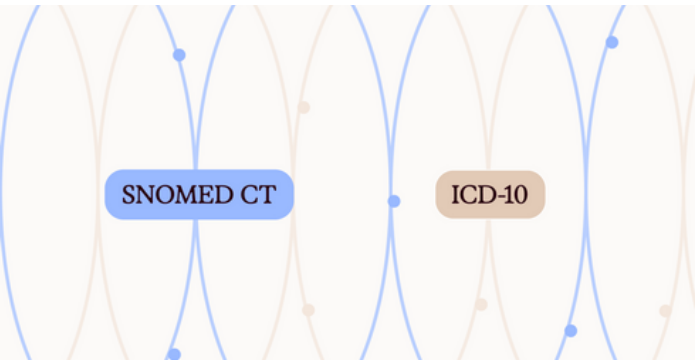
- + Word Library: Build your personal medical dictionary with specialty-specific terminology, abbreviations, and automatic word substitutions for common errors.
- + Shortcuts: Use keyboard shortcuts with 24+ commands including consult management, text formatting, navigation, and settings toggles accessible via 'S' key
- + Snippets: Use "/" trigger followed by custom shorthand commands to insert pre-saved text phrases instantly into notes and documents.





Medical Coding

Get the codes right without the guesswork. Heidi suggests relevant UK medical codes as you document, prioritised by clinical context and linked to evidence - so you can code accurately and capture appropriate revenue without needing specialist coding knowledge.

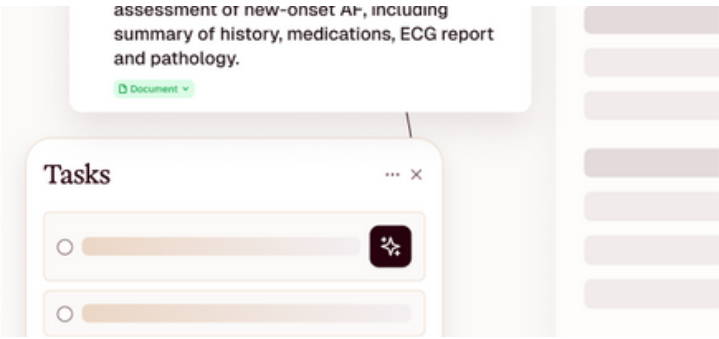


- + Generate automatic medical code recommendations for SNOMED-UK, ICD-10-UK, and OPCS-4.10-UK code sets.
- + Prioritise codes by high, medium, and low relevance with links to evidence from your transcript and notes.
- + Confirm, replace, or manually add codes with one-click functionality and a visual progress indicator.



Tasks

Never lose track of what comes next. Heidi captures follow-up actions as you work - from referrals to medication reviews or referral letters. Heidi organises them in one place, so you can focus on patient care knowing nothing will slip through the cracks.



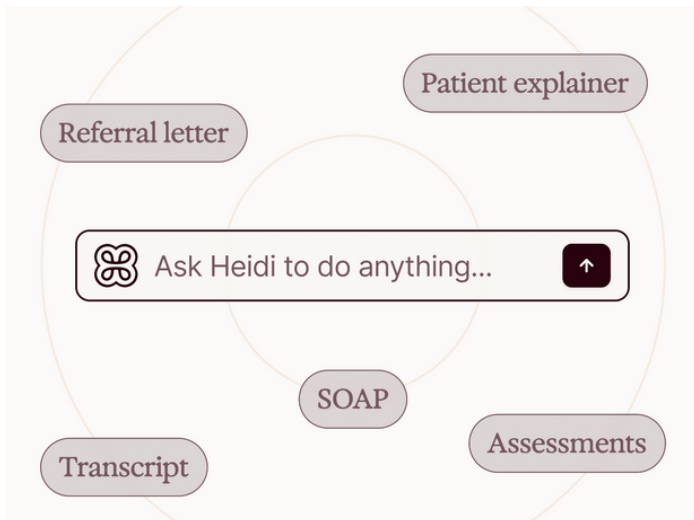
- + Generate automatic to-do lists from each clinical encounter with follow-up actions, including referrals, medication monitoring, patient follow-ups, and care coordination.
- + Generate documents from your task list using Heidi's AI note generator with one click.
- + Access a full view of your tasks across all patients and encounters in a consolidated master list, with the ability to add, edit, remove, or action tasks at any time.



Ask Heidi

Your clinical AI assistant, ready when you need it. Ask Heidi handles everything from reformatting notes to generating referral letters, all in natural language - so you can get the documents you need without breaking your workflow.

- + Engage with Heidi quickly to complete a task, ask a question, or create a document or template.
- + Ask questions using natural language requests to get information relating to the consultation, like quotes from the patient.
- + Create documents or templates based on your consultation, language preference or clinical requirements, including referral letters, handover summaries, and billing codes.



Patient Profiles

See the full story, not just today's chapter. Patient Profiles connect all your encounters with each patient in one place, so you can spot patterns, track progress, and make decisions informed by their complete clinical history - while Session Status keeps your team aligned on where each consultation stands.

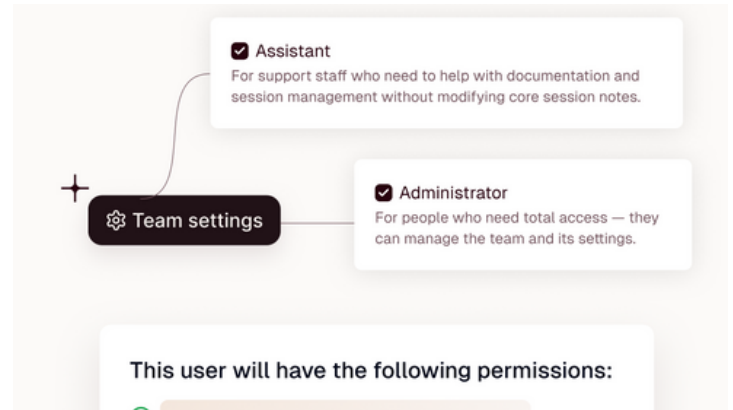
- + Create and manage unified patient data across multiple sessions using customisable patient identifiers.
- + Link consultations using the link button to group encounters chronologically within patient "files".
- + Assign progress status tags to your Heidi Sessions to easily track appointments and documentation progress on your busiest clinic days and collaborate with your team more efficiently.



Team Collaboration

Keep your team aligned without the admin headache. Heidi's team features let you collaborate on patient care, share documentation standards, and manage billing in one place - so everyone works consistently while you maintain oversight and control.

- + Create multi-user workspaces with centralised admin control and role-based access (Administrator/Clinician/Assistant roles).
- + Pay unified billing with single invoice regardless of team size, with automatic team member payment consolidation.



- + Share templates with team members by changing visibility from "Me" to "Team" in Template Library, with automatic syncing across the entire team.



Offline Functionality and Seamless Synchronisation

Offline mode supports ambient capture and pause/resume with secure local storage, critical for community, domiciliary, or rural settings.

- + Transcribe multiple sessions in low/no connection environments, with no fear of session loss.

- + Sync sessions seamlessly to any connected device once connectivity is regained.

Interoperability and Integrations

Heidi is designed to integrate with EPRs & NHS systems using established, standards-based FHIR and HL7 approaches, enabling organisations to embed Heidi into existing clinical workflows rather than requiring parallel systems.

Integration is delivered in collaboration with local IT teams and can be tailored to align with the organisation's technical architecture and deployment preferences.

Heidi already integrates with a number of widely used NHS Electronic Patient Record (EPR) systems, including Epic, EMIS, SystmOne, and Cerner Millennium. These integrations allow Heidi to retrieve relevant clinical context and return clinician-approved documentation directly into the patient record.



Heidi follows a structured, phased onboarding approach designed to support safe adoption, local ownership, and sustainable use across different clinical roles and specialties.

3. Once workflows are established, the service is rolled out more widely within the specialty or service area.
4. Training is delivered in an inclusive and flexible manner to accommodate different learning styles, schedules, and accessibility needs. A combination of short live sessions, recorded materials, self-paced guidance, and optional drop-in support is provided.

1. Initial onboarding focuses on aligning with local clinical practice before broader rollout.
2. Following initial validation, onboarding is extended to relevant administrative and support staff, with training tailored to local processes.



5. A train-the-trainer model underpins the onboarding approach, with designated local champions acting as first-line points of contact and supporting peer-to-peer learning. This model helps embed knowledge within the organisation and supports long-term adoption without ongoing dependency on the supplier.
6. Ongoing support and capability development are available following initial onboarding. This includes optional refresher sessions, workflow optimisation support, and targeted training to support evolving clinical or operational requirements.

Onboarding strategy

Onboarding, *Implementation* and Training

Service levels and SLAs

Heidi operates a structured, multi-level support and escalation model to ensure that issues are handled by the appropriate teams based on clinical, technical, and governance impact. Initial queries and routine technical support are handled by frontline support specialists, with escalation to dedicated implementation, integrations, and technical teams where issues are complex, recurrent, or environment-specific.

Where incidents have potential implications for patient safety, data protection, service continuity, or regulatory compliance, cases are escalated directly to senior engineering and clinical safety leadership, with executive and governance oversight engaged where required. This ensures that high-risk or high-impact issues receive immediate senior attention and are managed through formal incident and remediation processes aligned to NHS expectations.

Support is provided through multiple channels, including in-product live chat, email support, and scheduled video calls for advanced troubleshooting or workflow optimisation.

99.9%

monthly availability
commitment

The service offers a monthly availability commitment of 99%.

99.92%

observed uptime

Actual production performance has exceeded the contractual commitment, with observed uptime of 99.92% over the most recent six-month period.

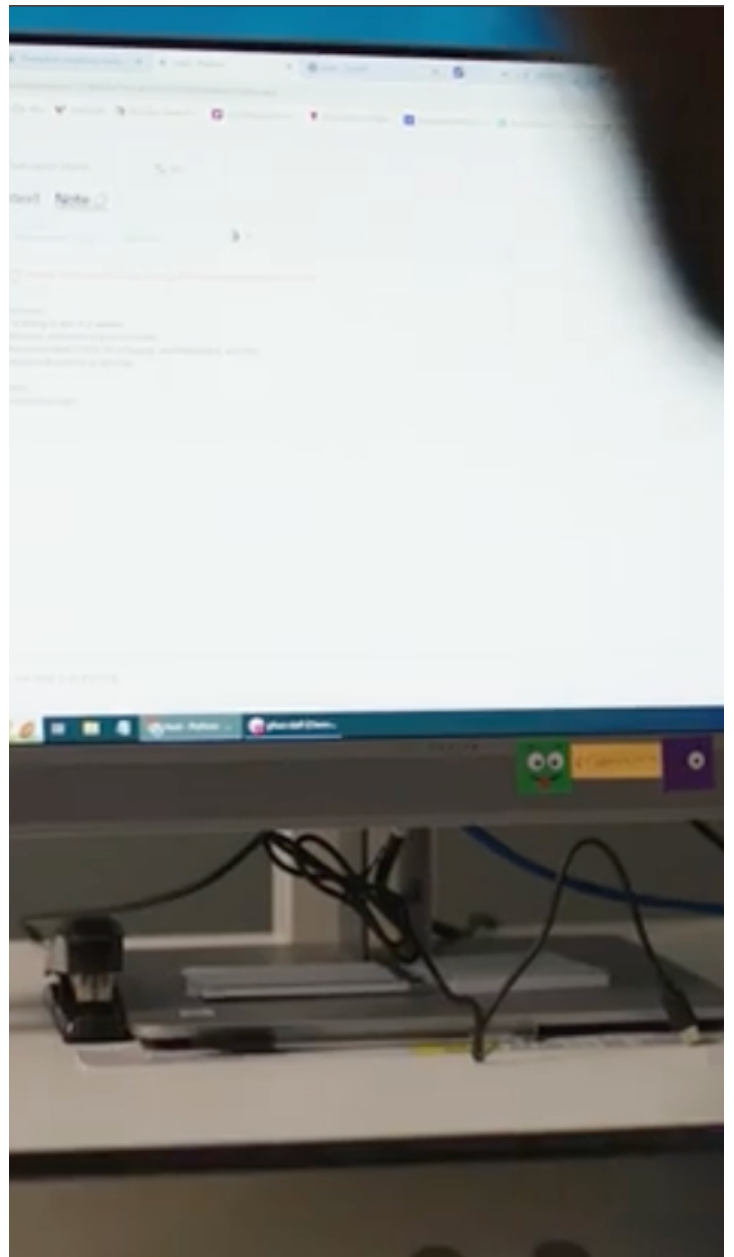
Service Management

Heidi operates a structured service management framework designed to support the reliable, safe, and continuous operation of a cloud-based clinical Software-as-a-Service (SaaS) platform.

The service is architected for high availability and uses a zero-downtime, cloud-native deployment model to ensure that routine updates and security patches can be applied without interrupting clinical use. Where live migration is not possible, essential maintenance is scheduled during off-peak hours between 23:00 and 05:00 UK time, with advance notice provided.

Maintenance, upgrades, and enhancements follow a controlled release process. Updates progress through defined development, staging, and pilot environments before being promoted to production as part of a structured release cadence.

Service performance and stability are maintained through proactive monitoring and formal incident management processes.



Security, *Information assurance* and Governance

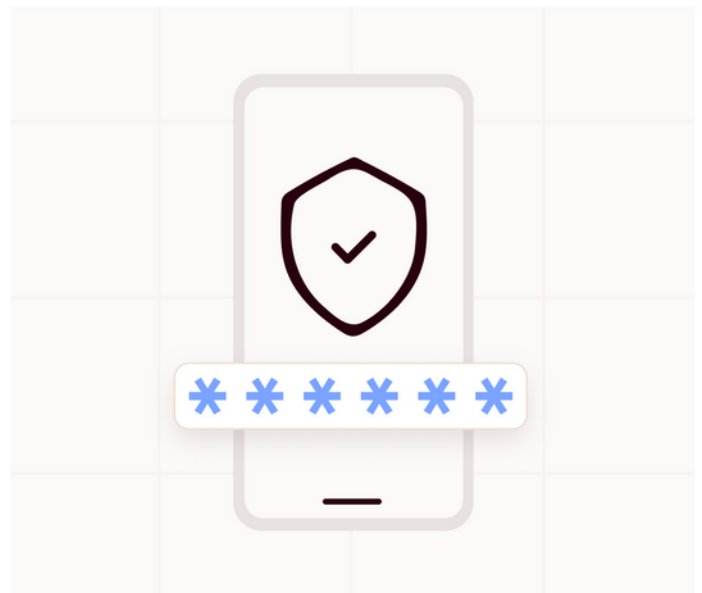
Heidi has completed the DTAC self-assessment and is supported by an evidence pack addressing all baseline requirements. This includes documented controls covering clinical safety, data protection, technical security, and interoperability, underpinned by relevant external certifications.

Heidi operates a comprehensive security and information governance framework designed to meet the requirements of UK public-sector and NHS organisations. The service is underpinned by an independently certified Information Security Management System (ISMS) and follows a secure-by-design approach across software development, operations, and data processing. The organisation holds ISO/IEC 27001:2022 certification, SOC 2 Type II attestation, ISO 9001 certification, ISO 42001 certification and Cyber Essentials Plus accreditation, providing external assurance over the confidentiality, integrity, and availability of the service. The service also maintains a current NHS Data Security and Protection Toolkit (DSPT) status of “Standards Met” and has completed the DTAC self-assessment.

Security assurance is supported through regular testing and proactive vulnerability management. The service undergoes annual external penetration testing conducted by a CREST-accredited provider, covering web applications, APIs, mobile and desktop clients, and underlying cloud infrastructure. In addition, internal vulnerability assessments and dependency scanning are performed on a quarterly basis. Identified vulnerabilities are risk-rated using recognised scoring methodologies and remediated within defined timescales, ensuring that security issues are addressed promptly and proportionately.

Access to systems and data is controlled using a zero-trust security model based on the principle of least privilege. Role-Based Access Control (RBAC) is applied across clinical, administrative, and engineering functions, with Multi-Factor Authentication (MFA) mandated for all internal systems.

Data protection and privacy controls are embedded throughout the service. All data is encrypted in transit and at rest using current industry standards and managed key rotation (TLS 1.2+ encryption in transit and AES-256 at rest). Patient audio is processed as a live encrypted stream and is not retained beyond the transcription process unless explicitly configured for specific clinical use cases. Data minimisation, pseudonymisation, and strict access controls are applied to reduce risk and support compliance with UK data protection legislation.



Data protection and Privacy



Heidi operates a clear and transparent data protection framework aligned with the GDPR, the Data Protection Act 2018, and NHS information governance requirements. For NHS deployments, the contracting healthcare organisation acts as the Data Controller and retains ownership and control of all clinical and user data. Heidi acts as the Data Processor and processes information strictly in accordance with the Controller's documented instructions and the terms of the Data Processing Agreement. All UK patient and user data is stored exclusively within the United Kingdom.

The service applies strong data minimisation principles. Consultation audio is processed as a transient encrypted stream and is not stored for ambient consultations; audio is discarded immediately once transcription is complete. Transcripts and AI-generated clinical notes are retained only for a configurable period defined by the Data Controller.

Privacy by design is embedded throughout the service architecture. Patient data is de-identified and pseudonymised before being processed for clinical documentation, reducing exposure of identifiable information. All AI-generated outputs are presented as drafts and remain under clinician control; no information is written to the Electronic Patient Record without explicit clinician review and approval. These controls ensure that accountability for clinical records remains with the clinician and the Data Controller at all times.

Business Continuity & Disaster Recovery

Heidi maintains documented business continuity and disaster recovery (BCDR) plans designed to sustain acceptable service levels during disruptions.

Our approach is aligned with widely used UK best practice for continuity management, including the expectation that plans are formally documented, owned, and kept up to date through regular review.

Our platform is delivered on resilient cloud infrastructure with redundancy, routine backups, and tested recovery processes.

We define recovery objectives for critical services and validate readiness through scheduled exercises, including table-top simulations and periodic full recovery tests, so we can demonstrate that our plans work in practice rather than only on paper.

Technical Requirements

Heidi is designed for deployment across the diverse technical environments found within NHS and public-sector healthcare organisations.

Heidi is available via native applications for desktop and mobile operating systems, as well as through a standard web interface, ensuring consistent functionality across devices and care settings.	Heidi is hardware-agnostic and compatible with commonly used clinical audio equipment, allowing organisations to use existing devices without additional infrastructure.
Real-time use requires a stable internet connection; however, the service supports encrypted offline capture to allow continued use during connectivity interruptions, with automatic synchronisation once connectivity is restored.	

Below is a comprehensive overview of Heidi's technical requirements:

Operating Systems

Desktop/Laptop	Mobile	Supported Browsers
+ Minimum: Windows 7 or later, macOS 10.10 or later + Recommended: Windows 10 or later, macOS 10.15 or later	+ Android: 8.0 (Oreo) minimum, latest version recommended + iOS: iOS 13.4 minimum, latest version recommended + Storage: 100 MB free space	+ Latest Chromium-based browsers (Google Chrome, Microsoft Edge) + No plug-ins or local installation required for web access + Storage: 100 MB free space

Internet & Connectivity Requirements (Bandwidth)

Desktop/Laptop:

- + Minimum: 10 Mbps
- + Recommended: 20 Mbps

Mobile:

- + Minimum: 5 Mbps
- + Recommended: 10 Mbps

Network Performance Tolerances

Heidi operates reliably under the following conditions (with built-in retries and resumable uploads):

Latency (RTT):

- + Interactive actions: ≤ 300 ms sustained; brief peaks ≤ 800 ms for ≤ 60 seconds
- + Background transfers: ≤ 600 ms sustained; brief peaks ≤ 1200 ms for ≤ 120 seconds

Packet loss:

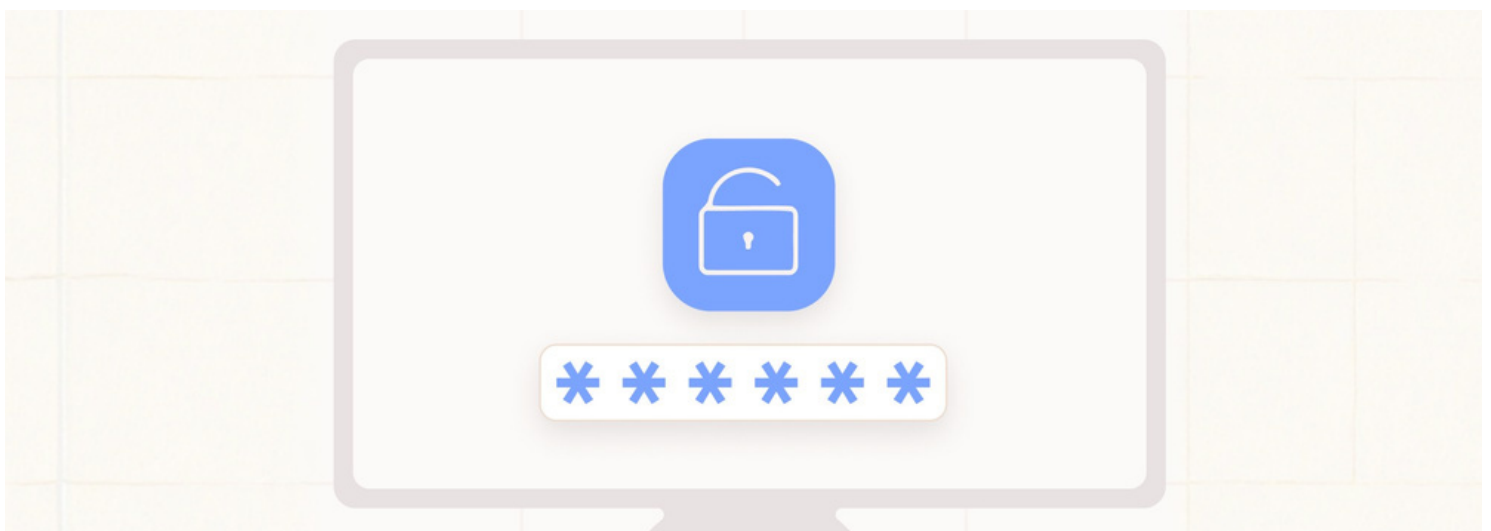
- + Interactive: $\leq 1\%$ sustained; $\leq 3\%$ bursts for ≤ 30 seconds
- + Background: $\leq 2\%$ sustained; $\leq 5\%$ bursts for ≤ 60 seconds

Jitter:

- + Interactive ≤ 50 ms p95

Offline capability

Mobile apps work offline, saving data locally and syncing when connectivity returns.



Hardware Requirements

Component	Minimum	Recommended
Processor	Intel Core i3 (2nd gen) or equivalent AMD	Intel Core i5 or equivalent AMD Ryzen 5
Memory	4 GB RAM	8 GB RAM or more
Hard Drive	20 GB free space	50 GB or more
Screen Resolution	1024×768	1280×720 or higher
Monitor Size	13 inches or larger	15 inches or larger
USB Ports	N/A	Refer to your microphone
DVD Drive	No	No
Expansion Slots	No	No

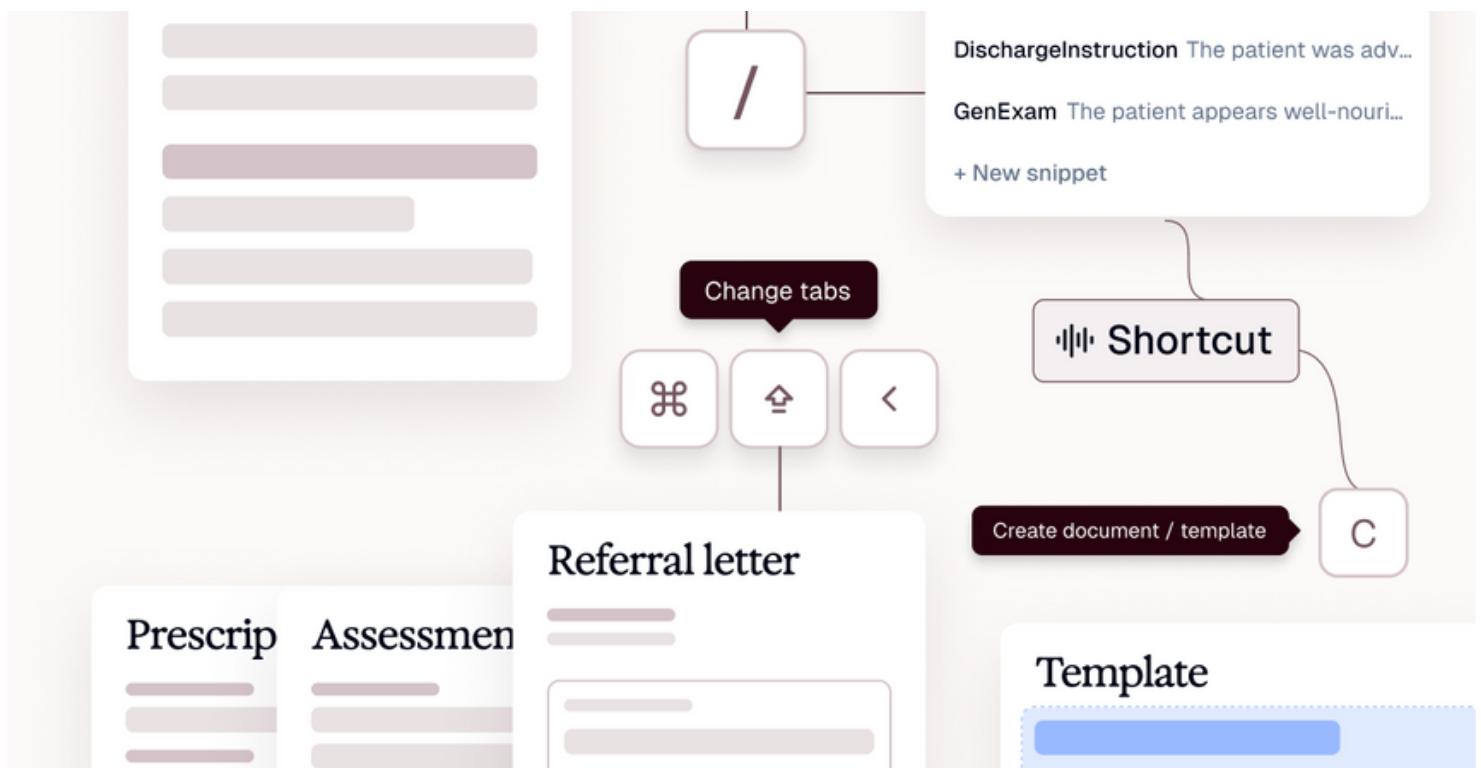
Security Requirements

- ✦ Up-to-date antivirus and anti-malware software
- ✦ MDM compliance (devices should comply with clinic's MDM policies)
- ✦ Supports MFA, SSO (including Azure Entra ID, SAML, OAuth2, OIDC), and RBAC

Service Constraints and Dependencies

Heidi is delivered as a resilient, cloud-based service designed to maintain high availability and continuity of use across NHS environments. The platform is hosted on enterprise-grade infrastructure and incorporates redundancy, monitoring, and automated recovery mechanisms to minimise the impact of component or localised failures. Real-time functionality is supported where connectivity allows, and the service includes encrypted offline capture to ensure consultations can continue during temporary network disruption, with secure synchronisation once connectivity is restored.

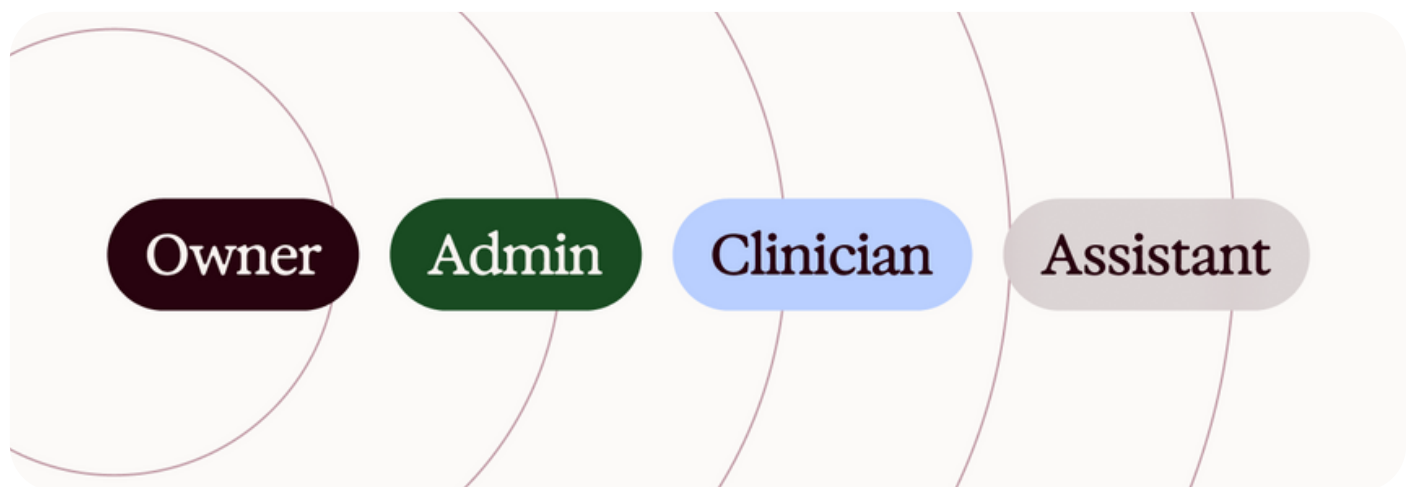
Integration with local Electronic Patient Record systems is designed to be tolerant of downstream system availability, with clinician-approved documentation securely queued for submission during periods of EPR downtime and reconciled automatically once connections are restored. Service performance is supported through deployment guidance and training that address environmental factors such as audio quality and room conditions, helping organisations achieve consistent and reliable operation in day-to-day clinical use.



Offboarding & Exit Plan

Heidi provides a structured, no-cost off-boarding and exit approach designed to ensure service continuity, data integrity, and compliance with public-sector information governance requirements at contract termination or expiry. The exit process is documented and agreed in advance, and is intended to support an orderly transition to a successor supplier or an alternative internal system without vendor lock-in.

Off-boarding is supported through a coordinated transition programme involving nominated customer representatives and Heidi Health's implementation and technical teams. This includes planning of exit timelines, support with final data extracts, and technical validation where required. Throughout the off-boarding period, the customer remains the Data Controller, and Heidi continues to act solely as Data Processor in accordance with the Data Processing Agreement.



Social & Economic Values



Economic Value

Education, Outreach and Digital Inclusion

Heidi's approach to implementation includes knowledge transfer and community engagement, helping ensure that digital transformation does not leave people behind. This includes:



Building digital capability in the community

Each deployment includes structured knowledge-transfer sessions for staff on topics such as prompt engineering, AI governance, and data stewardship.

These sessions equip local digital and clinical teams with transferable skills aligned to the NHS Long Term Workforce Plan, fostering a self-sustaining culture of digital innovation across the ICB. Where appropriate Heidi partners with digital teams to deliver open learning sessions for students and allied-professionals at colleges and universities in the community.



Accessible high-value employment

Heidi's hybrid working model enables the community across the UK to access roles across various functions without relocating, broadening access to high-skill, high-wage digital careers. Heidi also offers internships and work placements and career awareness initiatives to local students, providing real experience in regulated health-tech environments.



Responsible economic contribution

Our co-development model allows early-adopter customers to collaborate on new features and participate in user-research studies keeping innovation value within the community while aligning product development with the real needs of its members.



Social Value

*Inclusion,
Empowerment,
and Shared
Community
Benefit*



Reinvesting local value

By reducing inefficiency and overtime dependence, Heidi helps customers redirect savings into programmes that tangibly benefit communities:

- Local recruitment and retention programmes, supporting stable employment and career development for clinicians
- Community initiatives, including mental-outreach, prevention campaigns, or chronic-disease management projects
- Training and upskilling, strengthening the local skills base



Digital inclusion and equal access

Heidi's platform is built to be accessible to all users, meeting WCAG 2.1 AA standards for visual contrast, keyboard navigation, and screen-reader compatibility. This ensures that staff with differing abilities or digital confidence levels can use the system effectively, supporting the region's commitment to equitable access to technology. Heidi runs entirely in the browser or mobile phone (no specialist hardware or installation is required). This supports use in lower-bandwidth (via offline mode on our mobile app) or community settings, narrowing the regional digital divide.



Participation and local empowerment

Heidi's co-design model invites continuous feedback from clinicians and operational teams ensuring that local voices help shape how the technology evolves rather than passive adoption. This cultivates digital leadership and confidence within the workforce, while ensuring that new technology reflects the specific operational and cultural realities of local communities.



Strengthening trust and public understanding

Heidi works transparently with NHS partners to build public literacy around how AI is applied safely, ethically, and within regulatory boundaries. Through accessible demonstrations and engagement sessions, students and future healthcare professionals gain a clearer understanding of how responsible AI supports better care, without replacing the human connection at the heart of it. This fosters trust between citizens, clinicians, and digital suppliers, ensuring that digital transformation in the UK is both human-centred and community-owned.

Case Studies



Primary Care

500k patients
300+ clinicians

In late 2024, Modality Partnership, an award winning GP super-partnership, implemented the UK's largest clinical rollout of AVT at the time, below are results from the partnership with Heidi.

Day-to-day impact on clinicians

51%

reduction in time spent on documentation during consultations (from 4 to 2 minutes).

61%

decrease in documentation completed outside of working hours.

38%

increase in satisfaction in note quality.

33%

increase in confidence that notes accurately reflected consultations.

45%

increase in perceived work-life balance (Maaslach Burnout Inventory).

58%

agree that Heidi has reduced their cognitive load during sessions.

Case Studies

Secondary Care

Outpatients, Same Day Emergency Care, Medical Secretaries

Acute NHS Trust

Between March and June 2025, An acute NHS Trust based in the Midlands piloted Heidi in SDEC, outpatients and administrative teams.

Impact in Same Day Emergency Care

71%

reduction in time spent on documentation during consultations (from 8.6 to 2.5 minutes).

40-50%

improvement in secretarial throughput on outpatient discharge letters.

>90%

of patients reported they felt more listened to.

Administrative Performance Improvements

93%

decrease in letter backlog, from 2700 letters to less than 200.

2 Day

letter turnaround time, down from 6 months.

58%

reduction in clinical documentation errors.

Case Studies



Community Care

GPs, Consultants, Allied Professionals, Advanced Practitioners, Specialist
Community Teams and Nursing staff

15-20

minutes saving per patient

Winners of Social Enterprise of the year through introducing & integrating Heidi into practice

Clinician Impact and Experience

97%

of respondents reported improvement in wellbeing.

61%

decrease in documentation completed outside of working hours.

38%

increase in satisfaction in note quality.

Operational improvements

20%

increase in overall productivity.

180

new patient capacity, whilst also making time for bi-monthly staff training days.

50%

reduction in clinical documentation errors.

Heidi

By your side

