



Leafnotes Service Definition v1.0

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G Cloud 15

Service Definition – Leafnotes (G-Cloud 15)

What the service is and the value it provides

Leafnotes is a technology and AI-enabled *Intelligent Care Management System (CMS)* designed for use across children's and adults' social care and related services. The system uses assistive AI to support professionals to capture, draft and manage high-quality records, assessments, referrals and reports, while reducing the administrative burden associated with routine documentation.

By supporting faster, clearer and more consistent recording, Leafnotes helps professionals spend less time on paperwork and more time on direct work, supervision and decision-making. As an Intelligent Care Management System, Leafnotes supports improved consistency, visibility and oversight of care and case information, while ensuring that professional responsibility and judgement remain with the user. This can contribute to improved workforce sustainability, reduced duplication of effort and more timely information being available to support practice.

Leafnotes operates as a standalone CMS and can be used independently by organisations and professional services requiring secure, structured care and case recording.

The service is suitable for use by a range of professional roles, including (but not limited to):

- Care and support staff
- Social care practitioners
- Social workers
- Supervisors and managers
- Senior and Executive leaders
- Professionals completing assessments, referrals, reviews or reports

For people receiving services, improved recording quality and consistency supports clearer care histories, more accurate assessments and better continuity of information across teams and over time. This can help ensure that decisions are better evidenced, risks are more clearly recorded, and care planning reflects a fuller understanding of need and progress.

AI functionality within Leafnotes is assistive only. It supports drafting and structuring content but does not make decisions or replace professional judgement. Responsibility for the accuracy, appropriateness and finalisation of records remains with the professional user.

Key Features

- Person centred profiles for more personal care delivery
- Streamlined daily care logging with speech to text support and multi-reports allowing support workers to quickly report for multiple clients
- Thorough care planning with customisable templates
- Bespoke form development for collecting a range of different data points
- Smart assessments, for onboarding and for ongoing monitoring
- Risk management with mitigation actions, assignment and follow-ups
- Intelligent actions based on care plans, incidents, and organisational processes
- Ability to upload and manage multimedia, including photos and videos
- Third party integration
- Full-featured mobile application for iOS and Android devices

Data backup, restore and disaster recovery

Leafnotes includes managed data protection, backup and resilience arrangements appropriate for services handling sensitive and special category personal data within children's and adults' social care.

The service operates within a security framework aligned to recognised good practice. Leaf AI currently holds Cyber Essentials Plus certification and is working towards ISO/IEC 27001, with information security controls, risk management processes and documented policies in place to support this progression.

Data backup and resilience arrangements include:

- Regular automated backups of customer data
- Secure, encrypted storage of backups within the hosting environment
- Documented data restore procedures to support service recovery
- Business continuity and disaster recovery (BCDR) arrangements proportionate to service criticality and usage

Backup retention periods, Recovery Point Objectives (RPO) and Recovery Time Objectives (RTO) are defined and managed as part of the hosted service and aligned to the service's operational risk profile.

Business continuity and disaster recovery arrangements are reviewed periodically and tested in line with internal governance processes to ensure ongoing effectiveness and suitability.

Onboarding and offboarding support

Onboarding

Leafnotes provides structured onboarding support to ensure the service is implemented safely, efficiently and in line with customer requirements.

Onboarding support may include:

- Initial system configuration, including setup of organisational structures, teams and permissions
- User and role configuration, ensuring appropriate access controls are in place for different professional roles
- Configuration of templates and recording formats, aligned to the customer's recording practices and service context
- Guided onboarding sessions for administrators, managers and users, delivered remotely where appropriate
- Early-life support following go-live, including access to support and stabilisation activities to address initial queries or issues

Onboarding scope, responsibilities and timescales are agreed with the customer prior to service commencement and documented as part of the service agreement.

Offboarding

Leafnotes provides planned offboarding support to enable an orderly transition at the end of the service or following contract termination.

Offboarding support may include:

- Export of customer data in agreed formats, enabling continuity of records and access to historical information
- Support for planned transition to another system, where required and within agreed scope
- Secure deletion or purge of customer data, following confirmation from the customer and in accordance with contractual, legal and regulatory requirements

Data handling during offboarding is managed in line with data protection obligations, and confirmation of data deletion or retention is provided where applicable.

Service constraints

Leafnotes is delivered as a cloud-hosted service and operates within defined service and technical parameters to ensure security, reliability and consistency.

Service constraints include:

- **Access requirements:** Leafnotes requires a modern, supported web browser and a reliable internet connection. Performance and availability are dependent on the customer's local connectivity and device environment.

- **Use of voice-based drafting:** Where voice-based drafting is used, accuracy and usability may be affected by microphone quality, background noise and recording conditions. Users remain responsible for reviewing and confirming the accuracy of drafted content before finalising records.
- **AI-assisted drafting limitations:** AI functionality within Leafnotes is assistive only. It supports the drafting and structuring of content but does not validate, approve or make decisions. Professional users must review, amend and approve all records prior to submission or use.
- **Configuration and customisation:** Customisation is limited to configuration options available within the service, such as templates, workflows, roles and permissions. The service does not support unrestricted bespoke development outside the standard product roadmap.

These constraints are in place to support consistent service performance, maintain information security and ensure safe, appropriate use of AI-assisted functionality.

Service levels

Leafnotes is delivered as a managed cloud service with defined service levels designed to support reliability, continuity and effective operational use.

Service levels include:

- Service availability targets, aligned to the criticality of the service and agreed as part of the contractual arrangements
- Incident management processes, covering incident logging, classification, triage and resolution
- Defined support response times, based on incident severity and impact
- Escalation procedures for incidents requiring additional technical or operational intervention

Service availability commitments, support hours, response times and escalation arrangements are agreed and documented within the call-off contract. Performance against agreed service levels is monitored as part of ongoing service management.

Training and user support

Leafnotes includes training and user support to enable the safe, effective and consistent use of the service across professional roles.

Training and user support may include:

- Guided onboarding sessions for users and administrators, covering core functionality, roles and permissions, and day-to-day use of the system

- Access to user guidance and support materials, including written and digital resources to support ongoing reference and learning
- Ongoing user support, providing assistance with system use, configuration queries and issue resolution
- Guidance on the appropriate use of AI-assisted drafting, supporting responsible use within professional practice and reinforcing the requirement for user review and approval of all records

Training scope, delivery approach and support arrangements are agreed as part of onboarding and documented within the service agreement. Support remains available throughout the service term to ensure continuity, safe use and effective adoption.

Consumer responsibilities

Customers are responsible for ensuring the service is used appropriately within their organisational and professional context.

Customer responsibilities include:

- Ensuring appropriate use of the service by authorised users, in line with local policies, procedures and professional standards
- Managing local user access, credentials and permissions, including the timely creation, modification and removal of user accounts
- Reviewing, validating and approving records created using AI-assisted drafting prior to final use, submission or decision-making
- Ensuring compliance with applicable information governance requirements, including data protection, confidentiality and record-keeping obligations
- Maintaining suitable devices and reliable internet connectivity to enable access to the service

These responsibilities support the safe, lawful and effective operation of Leafnotes and help ensure that professional judgement, accountability and organisational governance remain with the customer.

After sales support

After-sales support for Leafnotes is provided through a support logging system designed to ensure the ongoing, safe and effective use of the service.

After-sales support includes:

- Access to a dedicated support contact for service queries, incidents and technical issues

- Incident and fault reporting processes, with logging, tracking and resolution in line with agreed service levels
- Service communications, including notifications relating to service updates, maintenance or operational matters
- Ongoing guidance for the safe and appropriate use of AI-assisted drafting, supporting consistent and responsible use within professional practice

Support arrangements, including contact routes and escalation procedures, are communicated to customers as part of the onboarding process and remain available throughout the service term.

Technical requirements

Leafnotes is delivered as a cloud-hosted service and is accessed via standard web technologies.

To use Leafnotes, customers require:

- A modern, supported web browser, using a current version
- Reliable internet connectivity to access the service
- User accounts with appropriate roles and permissions, configured during onboarding

Access to the mobile app requires a modern smartphone running an up to date version of Android or iOS. The service is fully managed by the supplier, including hosting, maintenance and updates.

Outage, maintenance management and software updates

Leafnotes operates defined processes for the management of planned maintenance, software updates and unplanned service outages, with the aim of maintaining service availability, security and performance while minimising disruption to users.

Outage, maintenance and update management includes:

- Planned maintenance and software updates, scheduled to minimise operational impact on customers wherever possible
- Controlled deployment of software updates, including patches, enhancements and security updates, managed by the supplier as part of the SaaS service
- Advance notification to customers of planned maintenance or updates, where practicable, including details of expected impact and expected duration
- Unplanned outage management, handled through documented incident response and recovery procedures

- Incident communication, providing timely updates to customers during significant service interruptions

Maintenance windows, update deployment arrangements, notification processes and communication channels are defined as part of the service agreement and form part of the ongoing service management approach.

Following significant service incidents or outages, post-incident reviews are undertaken to identify root causes and lessons learned, with actions used to inform service improvement and operational controls.

Hosting options and locations

Leafnotes is delivered as a cloud-hosted Software as a Service (SaaS) solution.

Hosting arrangements include:

- Secure cloud infrastructure, operated and managed by the supplier
- UK-based data centres, ensuring data residency within the United Kingdom
- Fully managed hosting, including infrastructure management, platform updates, patching and security controls

The supplier is responsible for the operation, maintenance and security of the hosting environment, with no requirement for customer-managed infrastructure.

Access to data on exit

Leafnotes supports clear and controlled access to customer data upon service exit, enabling continuity of information and compliance with data protection obligations.

Upon service exit, customers can:

- Request export of their customer data in agreed formats, supporting retention of records and continuity of service
- Agree the scope and format of data exports, including the timing and method of delivery
- Receive confirmation of secure deletion or purge of customer data, following successful export and subject to legal, regulatory and contractual retention requirements

Data handling during exit is managed in line with applicable data protection legislation, including UK GDPR and the Data Protection Act 2018. Where data is retained to meet legal or regulatory obligations, this is documented and agreed with the customer.

Data access, retention and deletion arrangements are agreed at contract stage and form part of the call-off agreement, ensuring clarity and transparency throughout the service lifecycle.

Security

Leafnotes is designed for use in environments handling sensitive and special category personal data, including information relating to children, adults at risk and individuals receiving care and support.

Security is managed through a combination of technical and organisational controls, aligned to recognised good practice and public sector expectations. Leaf AI currently holds Cyber Essentials Plus certification and is working towards ISO/IEC 27001, with an information security management framework in place to support this progression.

Security measures include:

- Role-based access controls, ensuring users can only access information appropriate to their role and responsibilities
- Encryption of data in transit and at rest, protecting data from unauthorised access or interception
- Secure authentication and access management, including user account controls and permission management
- Privacy-by-design and data minimisation principles, embedded into system design and development
- Compliance with UK GDPR and the Data Protection Act 2018, including appropriate handling of special category data

Where AI-assisted drafting or speech-to-text functionality is used, Leafnotes recognises that audio recordings, transcripts and drafted content may constitute personal data. Appropriate technical and organisational safeguards are applied to ensure such data is processed securely and lawfully.

Security policies, procedures and supporting documentation, including information security controls and incident management processes, are available to customers on request.