

G-Cloud 15 Service Definition Document

Suvera Planner

Automated Patient Recall Management for Primary Care

Lot 2b: Software as a Service (SaaS)
Framework: RM1557.15

Suvera Limited | January 2026

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1. Service Overview

1.1 Introduction

Suvera's Planner transforms patient recall from a fragmented, manual process into a single, automated workflow that operates at population scale whilst maintaining individual patient personalisation.

NHS general practices face a complex operational challenge in managing systematic recalls for hundreds or thousands of patients across multiple long-term conditions, medication monitoring requirements, and clinical reviews. Traditional approaches require significant administrative resources, create patient inconvenience through multiple separate communications, and risk patient safety when reviews are missed or delayed.

Suvera's service coordinates all outstanding reviews across conditions, co-morbidities, and medications into a single comprehensive workflow, delivering improved patient response rates, substantial reductions in administrative time, and robust evidence for clinical governance and regulatory inspections.

As one experienced practice user commented: *"I've been doing this for 13 years, and the [way you're displaying the data] is really good."*

1.2 Core Service Capabilities

Suvera Planner has a number of capabilities, all of which contribute to the goal of simplifying the recall process.

Holistic Multi-Condition Recall Coordination — Identifies all outstanding reviews across a patient's complete clinical profile and consolidates them into single coordinated recall events.

This eliminates duplicate communications for diabetes, hypertension, COPD, medication reviews, and other conditions. It also ensures that practices can consolidate reviews, maximising use of clinical slots.

Population-Scale Personalisation — Each patient receives a personalised SMS tailored to their specific conditions and outstanding reviews, generated automatically without manual intervention.

This increases patient compliance, making it more likely that they will attend appointments. Practice users report: *"I can take a glance and know what to do."*

Automated Blood Test Management — Automatically generates appropriate blood test requests based on each patient's conditions and medications, determining clinical requirements and creating requests without manual clinical record review.

This saves practices considerable administrative time, and prevents possible errors.

Direct Patient Appointment Booking — Patient communications include direct booking links with customised appointment slots, enabling practices to allocate appropriate time for multi-condition reviews and optimise clinical capacity.

Direct booking links have repeatedly been shown to increase the likelihood of patients attending their appointments, as they can better control the time and date.

Integrated EHR Coding and Audit Trail — Every action is automatically logged, coded, and recorded directly in the practice's EHR, creating complete audit trails for QOF achievement and CQC evidence without duplicate documentation.

Single Workflow Interface — Provides a unified interface for recall execution and monitoring.

Practices tell us this saves significant time navigating through a range of views in the clinical record system. Users note that it is *"very straight-forward to see what's going on."*

1.3 Key Benefits

Clinical Safety and Quality — Systematic automated identification ensures no outstanding reviews are missed. Automated blood test generation ensures investigations are ordered correctly and consistently. Complete audit trails support clinical governance requirements.

Operational Efficiency — Eliminates manual patient searches, individual blood test request creation, and multiple separate communications. Practices report substantial reductions in administrative time on recall management, redirecting staff capacity towards direct patient care.

Patient Experience — Patients receive single clear communications addressing all outstanding reviews, reducing inconvenience and confusion. Direct appointment booking reduces phone call volume. Combined multi-condition appointments mean fewer practice visits.

QOF and CQC Compliance — Supports systematic QOF achievement through evidenced recall processes with automatic clinical coding. Provides demonstrable evidence for CQC inspections of robust recall systems and quality monitoring processes.

1.4 Service Scope

In Scope:

- Automated patient identification for long-term condition reviews.
- Coordination of multiple reviews into single recall events
- Personalised SMS communications
- Automated blood test request generation
- Direct patient appointment booking.
- Full EHR integration with clinical coding and audit trails
- Campaign management and monitoring interface
- Reporting and analytics capabilities

Out of Scope:

- Clinical decision support or clinical protocol management. Planner executes recalls based on practice-defined protocols rather than defining those protocols
- Planner is fully integrated with practices' EHR systems, but does not replace them
- Telephone-based patient contact by our team
- Appointment management beyond direct booking
- Blood test result processing
- Patient portal functionality.

EHR Integration: We offer seamless integration with EMIS Web, TPP SystmOne and Medicus through secure, standards-compliant bidirectional connections. Practices continue using their existing EHR for all clinical documentation. Planner automates the recall workflow whilst ensuring all activity is recorded in the primary clinical record.

2. How It Works

2.1 Technical Architecture

Platform: Planner is a cloud-based SaaS delivered via web browser. No local installation is required. Users authenticate with NHS login credentials, with no need for additional passwords. All data is hosted in the UK on AWS's eu-west-2 server, based in the London region. Data encrypted at rest and in transit to TLS 1.2+ standard.

EHR Integration: We offer full, bidirectional integration with EMIS Web, TPP SystmOne and Medicus via the IM1 protocol. Read access identifies patients due for review, with write access coding all activity into patient records with appropriate clinical codes.

Authentication: NHS login provides secure single sign-on, eliminating password management burden and creating traceable audit trails linked to NHS identities.

2.2 User Workflow Example: Executing an Automated Recall

Planner supports multiple workflows for managing patient recalls and monitoring. The following illustrates a typical workflow for executing an automated recall campaign:

1. **Patient Identification** — Planner automatically identifies patients due for recall based on outstanding clinical parameters and NHS targets. The dashboard displays patients with colour-coded status indicators (green: complete; amber: incomplete).
2. **Initiating Recall** — User clicks "Recall" button on patient profile.
3. **Review Automated Plan** — Planner presents a preview showing all investigations, questionnaires, and outstanding reviews automatically selected based on the patient's clinical profile.
4. **Configure Booking (Optional)** — The user can set up a direct appointment booking link customised by appointment type, location, or clinician.
5. **Review SMS Content** — System generates a personalised SMS. Users can edit if required. Multiple questionnaires automatically consolidated into a single link.
6. **Automated Follow-Up** — System schedules reminder SMS 7 days later if patient doesn't respond.
7. **Start Sequence** — SMS sent immediately from the Planner, with the practice's Sender ID. Recall logged in patient profile and coded into EHR.

Dashboard Monitoring: Users access the dashboard, which provides ongoing status reports. These include visual status indicators, a detailed patient view showing recall history and outstanding requirements, manual recall logging capability for phone calls and in-clinic conversations.

2.3 Patient Journey

1. **Receive SMS:** Patient receives the SMS from practice sender ID, with personalised message and secure booking link
2. **Access secure web app:** The patient accesses using their name and date of birth, with no password needed
3. **Complete requirements:** Patients input BP readings, complete questionnaires and book appointments as appropriate
4. **Automatic confirmation:** The patient receives a confirmation, and the completion status is updated in Planner and the EHR
5. **Automated reminders:** The patient receives a reminder if requirements not completed within set period

2.4 Key Features

Automated SMS Generation: Personalised content; automatic EHR coding; consolidated questionnaire links; customisable booking links; automated reminder scheduling.

Blood Test Automation: Clinical protocol library and practice customisation options. Requests appear in practice's standard workflow.

Appointment Booking: Integrates with practice appointment systems. Patient bookings sync immediately; appear in normal schedule; automatically coded in EHR.

Customisation: Editable SMS content; configurable appointment slots; adjustable reminder timing; user can define patients to exclude.

Non-Responder Management: Automated reminders; clear dashboard indicators; manual follow-up tracking; escalation visibility.

Reporting: CSV export capability supports campaign monitoring, response tracking, QOF achievement, and clinical governance evidence.

Clinical Coding: Every action automatically coded in EHR, including recall SMS text, questionnaire completion, bookings, blood test requests, reminders, manual attempts. This creates a complete audit trail.

Multi-Condition Coordination: Single SMS listing all requirements; combined questionnaire links; appropriate appointment duration; single blood test request; one EHR entry.

3. Implementation and Support

3.1 Onboarding Process

Structured onboarding typically completed within 2-4 weeks. Throughout onboarding, practices are assigned a dedicated implementation specialist who coordinates activities and ensures user confidence before go-live.

Week 1: Technical Setup — DPA signature; EHR integration configured and tested; appointment booking integration established; NHS login configured; clinical protocols defined; SMS sender ID configured.

Week 2-3: Training — Remote training via video call for administrators, clinical leads, and reception staff. Live demonstrations, hands-on practice in a test environment, written materials and video tutorials provided.

Week 3-4: Go-Live — First live recalls executed with implementation specialist support available for immediate assistance.

3.2 Ongoing Support

Support Channels:

- **Email:** planner@suvera.co.uk (response within 1 business day)
- **Telephone:** 0800 048 8371 (Monday-Friday, 09:00-18:00 GMT)
- **In-Platform Help:** Documentation, guides, video tutorials
- **Account Management:** Dedicated account manager with quarterly check-ins

Response Time Commitments:

Priority	Description	Response Time	Resolution Target
Critical	Service unavailable; patient safety concern	2 hours	4 business hours
High	Significant functionality impaired	4 hours	1 business day
Medium	Minor issue; workaround available	1 business day	3 business days
Low	General enquiry; feature request	1 business day	5 business days

Service Maintenance: Scheduled maintenance out-of-hours with 5 days' notice. Automatic updates deployed. Release notes provided.

3.3 Service Level Commitments

Availability: 99.5% during business hours (Monday-Friday, 08:00-18:00 GMT), measured monthly. Excludes scheduled maintenance and factors outside Suvera's control.

Performance Targets: Dashboard 3 seconds; SMS delivery 5 minutes; EHR coding 15 minutes; appointment sync 2 minutes.

Data Backup and Recovery: Daily backups (30-day retention); weekly backups (12-month retention); Recovery Point Objective - 24 hours; Recovery Time Objective - 8 business hours. Geographic redundancy across UK AWS availability zones; automated failover; annual disaster recovery testing.

Offboarding: When offboarding, we will provide a full data export in CSV format, within 10 business days. All data written to the EHR will be maintained. User access will be deactivated, and full documentation provided.

3.4 Training and Documentation

User Documentation: User manual, quick reference guides, video tutorials, FAQs – all accessible within Planner and updated with releases.

Additional Training: Available on request for new staff refresher training, advanced features, practice-wide sessions (delivered remotely).

Service Constraints: Support Monday-Friday 08:00-18:00 only (except critical safety incidents). SMS delivery dependent on mobile reception and accurate EHR phone numbers; requires patient consent. Functionality dependent on EHR system availability.

4. Data Security and Compliance

4.1 Data Handling

Data Location: UK-based AWS (eu-west-2, London). Data does not leave UK jurisdiction, ensuring compliance with NHS data residency requirements and UK Data Protection Legislation.

Encryption: Data at rest is encrypted using AES-256. In transit, we use HTTPS and TLS 1.2+. Databases are encrypted and inaccessible to provider employees.

Data Minimisation: Only accesses data necessary for recall functions (structured clinical data for identifying patients due for review; writes only coded recall activity). Does not store complete medical records.

Data Retention: Active contract duration; 8 years post-termination for audit purposes; then secure deletion using industry-standard methods.

4.2 Information Governance

Data Protection Compliance: We are UK GDPR and Data Protection Act 2018 compliant. Suvera acts as a Data Processor. We put in place a comprehensive DPA with all customers clearly defining responsibilities, processing purposes, and security obligations.

Registration and Certification:

- ICO Registration: ZA567382
- NHS ODS Code: R7U1N
- Company Registration: 12237910

- Data Security and Protection Toolkit compliant
- Cyber Essentials: renewed annually

Data Protection Impact Assessments: We have carried out comprehensive DPIAs for all Planner processing activities including data storage, IM1 integration, and automated workflows, identifying and mitigating risks to data subjects' rights and freedoms. These are reviewed and where necessary amended on a regular basis.

4.3 Security Measures

Technical and Organisational Measures: Encryption at rest and in transit; ongoing system confidentiality, integrity, availability, and resilience; timely recovery capability following incidents; regular security testing and evaluation; 2FA (Google Workspace/NHS Mail via Auth0); 24-hour access token invalidation; AWS API logging retained indefinitely.

Access Controls: API authentication required; limited data per call; role-based access; least privilege principle; leadership approval for new access; automatic offboarding revocation; code review processes; monitoring and alerting systems.

Annual Security Testing: External penetration testing carried out annually, with any mitigations implemented.

Breach Management: Prompt customer notification including breach details, affected data, consequences, and mitigations. Documented incident response procedures. Customer (Data Controller) determines notification to data subjects/authorities.

4.4 Sub-Processors

All sub-processors subject to appropriate data processing agreements and due diligence:

- **AWS:** Cloud hosting (UK, eu-west-2)
- **MongoDB:** Database storage (contract with MongoDB Limited, Ireland; data stored encrypted in UK)
- **Twilio:** appointment/logistical notifications only, no clinical data (US, Standard Contractual Clauses)
- **Auth0:** Authentication (EU)
- **Hero Health:** Appointment booking (UK)
- **EMIS/TPP/New EHR Providers:** EHR integration (UK)

Customers are notified of changes and their right to object. A list of sub-processors is maintained in the DPA.

Staff and Policies: We ensure our staff are aware and actively supporting good data security. All staff receive GDPR training covering principles, procedures, security, incident

reporting, and special category health data. This is regularly refreshed. We have comprehensive policies for information security, data protection/privacy, incident management, business continuity, and access control – regularly reviewed and updated. These are available to all customers on request.

5. Evidence of Effectiveness

5.1 User Feedback

Practices using Planner report positive experiences with the service. User feedback highlights the clarity and usability of the interface:

"I've been doing this for 13 years, and the [way you're displaying the data] is really good."

Dashboard design facilitates efficient workflow management:

"I can take a glance and know what to do."

"Very straight-forward to see what's going on."

5.2 Operational Impact

Practices report substantial reductions in administrative time required for recall management. The consolidation of multiple condition-specific recalls into single coordinated events reduces both administrative burden and patient inconvenience.

Automated blood test generation and personalised SMS communications reduces manual tasks, improving consistency and accuracy. Direct patient appointment booking substantially reduces telephone call volume to practices whilst reducing the likelihood of DNAs.

5.3 Clinical Governance and Quality

The comprehensive audit trail and automatic EHR coding support practices in demonstrating systematic recall processes for clinical governance purposes and regulatory inspections.

Practices utilising Planner can provide clear evidence of recall attempts, patient responses, non-responder follow-up, and outcomes – supporting both QOF achievement and CQC inspection requirements.

5.4 Expected Outcomes

- Improved patient response rates through clearer, more convenient communications
- Substantial reduction in administrative time on recall management
- Better QOF outcomes across long-term condition indicators
- Complete documentation providing robust evidence for CQC inspections
- Single comprehensive appointments reducing patient visit burden
- Optimised use of clinical time through reduced administrative workload

6. About Suvera

6.1 Company Information

Suvera Limited

1st Floor Aylesbury Works
19 Aylesbury Street
London EC1R 0DB

Company Registration: 12237910

ICO Registration: ZA567382

NHS ODS Code: R7U1N

6.2 NHS Experience

Suvera is an established digital health provider specialising in NHS primary care solutions. The company develops and delivers software solutions designed specifically for NHS general practice workflows, information governance requirements, and clinical standards.

Suvera's development approach is informed by ongoing engagement with NHS general practices, ensuring solutions address real operational challenges faced by practice staff whilst aligning with NHS technical standards and regulatory requirements.

Quality and Compliance: We have comprehensive policies covering:-

- information security and data protection
- Incident management
- Business continuity
- Access control

All staff complete mandatory GDPR training with specific focus on special category health data. Annual security testing is completed by external specialists. We are DSPT compliant and hold Cyber Essentials certification.

Service Quality: We provide care to over 180,000 patients with long-term conditions, consistently achieving NHS targets with an average 81% patient engagement rate. Our patients receive an average of 8 touchpoints per year, compared to an industry standard of 2. Suvera has been recognised with two HSJ Award shortlists and won the HSJ Award for Digital Inclusivity. Patient feedback with the service is regularly 4.5/5 stars.

Continuous Improvement: We engage with our clients through regular account management meetings, and user feedback is incorporated into product development. Our policies and procedures are regularly reviewed. We are now extending this expertise through our Planner technology, enabling practices to recall effectively and manage patients with optimal efficiency.

6.3 Contact Information

For Service Enquiries:

Email: partnerships@suvera.co.uk

Telephone: 0800 048 8371

Website: www.suvera.com

For Support (existing customers):

Email: planner@suvera.co.uk

Telephone: 0800 048 8371

Hours: Monday-Friday, 09:00-18:00 GMT

6.4 Procurement

Planner is available through the G-Cloud 15 framework (RM1557.15, Lot 2b: Software as a Service). Pricing information is available separately in the G-Cloud 15 pricing schedule.

Practices interested in Planner can initiate the procurement process through standard G-Cloud 15 procedures or contact Suvera directly to discuss requirements and arrange a demonstration.

Technical Specifications Summary

For procurement and technical evaluation purposes:

Deployment Model: Cloud-based SaaS

Access Method: Web browser (no installation required)

Data Hosting: AWS eu-west-2 (London), UK only

Data Encryption: At rest (AES-256); In transit (TLS 1.2+)

Authentication: NHS login (NHS Mail) via Auth0

EHR Integration: EMIS Web, TPP SystmOne (IM1)

Backup Schedule: Daily (30-day retention); Weekly (12-month retention)

Recovery Objectives: RPO 24 hours; RTO 8 business hours

Availability Target: 99.5% business hours (Mon-Fri 08:00-18:00)

Certifications: Cyber Essentials; DSPT compliant

Compliance: UK GDPR; Comprehensive DPA; Completed DPIAs

Support Hours: Mon-Fri 08:00-18:00 GMT (critical issues 24/7)

Browser Compatibility: Chrome, Firefox, Safari, Edge (current versions)

Redundancy: Multi-availability zone deployment (UK)

Sub-Processors: AWS, MongoDB, Twilio, Auth0, Hero Health, EMIS/TPP

Document Information

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Framework: G-Cloud 15 (RM1557.15), Lot 2b (SaaS)

Supplier: Suvera Limited

Company Registration: 12237910

End of Service Definition Document