

Advanced Case Management

SERVICE DEFINITION

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Advanced Case Management Overview

Low-code, high-configuration, integrated advanced case management solution platform

PDMS, in strategic partnership with GoPro, delivers the Advanced Case Management system which is a complete yet extensible '5th generation' low-code, high configuration, integrated advanced case management solution platform, for case-, process-, rules-, content-, reporting-, and business activity management, mobile case management, self-service, and secure external process stakeholder collaboration.

The ACM platform is built to be agile and flexible for future changes. The majority of functionality can be configured out-of-the-box using 'Agile' methodology, without the need for scarce and costly specialist skills. ACM is designed for customer self-support, and its objective in each customer engagement is for the customer to become self-sufficient as quickly as possible, thereby reducing reliance on the vendor.

Critically, configuration and even customisation changes do not adversely affect future support and software upgrades.

The ACM Cloud Software has been subjected to exhaustive evaluation against the wider case management market by a number of large Government departments, where 'OFFICIAL-Sensitive' is applicable, and received its technical design authority sign-off that the platform is:

- 1 Technically advanced
- 2 Supportable
- 3 Upgradeable
- 4 The functionality is fit for purpose
- 5 The pricing is commercially acceptable

Key Features



Comprehensive

End-to-end case management with a unique focus on usability



Intuitive and Accessible

So that new or infrequent users can familiarise themselves quickly with minimal training



Flexibility

High degree of configuration flexibility, but also a complete, ready-to-use solution



Easy Registration

Easy registration with ready case templates



Workflow Management

Predefined workflows and tasks that users can easily manage



Process Management

Ad-hoc process management



Content Management

Document, template content and email management



Contact Management

Integrated contact and relationship management



BI & Reporting

Reports against a dedicated optimised reporting database



Rules Management Engine

Centrally maintained while used by many processes



Process Automation, AI Scheduling and Resource Automation

Dramatically improving efficiency



Collaboration

Self Service and third party stakeholder collaboration

Benefits

Some of the key benefits which ACM provides to Customers:

- ✓ Proven system used across many sectors including central and local government
- ✓ An easy-to-use interface which guides users through processes
- ✓ Out of the box functionality through pre-configured templates
- ✓ Increased speed of communications due to a range of collaboration features
- ✓ Configurable forms, workflow and correspondence template designers
- ✓ Complete audit trail through access control model
- ✓ Sophisticated SLA monitoring tools
- ✓ Local management of system through sophisticated administration features
- ✓ A range of time saving features

What we can offer

ACM enables in-house teams to quickly and easily configure and rapidly deploy advanced line-of-business solutions, using 'Agile' methodologies, but without the time, cost, and risk of developing from scratch. ACM has been deployed to some 200+ organisations in 20 countries, with the comprehensive out-of-the-box functionality configured to support line-of-business solutions including:

- Benefits Fraud Investigation & Prevention
 - Corruption Investigation Case Management
 - Fraud Investigation & Prevention
 - Automated Public Payments Processing
 - Automated Grant Disbursement
 - Corporate Legal Case Management
 - GDPR Requests Compliance
 - Independent Police Complaints Investigations Management
 - Ministerial Communications and Parliamentary Questions
 - Correspondence Management
 - Customer/Regulatory Complaints Management
 - Freedom of Information Act Requests
 - Registration, Inspection, Complaints, and Enforcement (RICE)
 - Data Protection Act
 - Licensing
 - Business Onboarding and Self-Service Applications
 - Grant Management
 - Research Grant Management
 - Contracts Management
 - European Medicines Agency processes
 - Person/Entity of Interest Tracking
 - Inspection Case Management
- ...and many more



Technical Requirements

Browser Compatibility

Our software is compatible with the latest versions of modern browsers: Microsoft Edge, Google Chrome, Safari and Firefox.





Approach to Delivery

Once you have decided to purchase ACM a number of steps, outlined below, will be required to set up your dedicated ACM implementation.



Design

Overall solution and infrastructure design



Data migration

Our data migration experts will facilitate the process of data mapping and migration using standard migration tools.



Business analysis

Defining or clarifying requirements and expressing these in user stories and by example acceptance criteria.



On-going support

With our cloud service we provide a full end-to-end support model. and also offer a range of enhanced support models if required.



Project management

PRINCE2 and agile delivery methodology and our customer on-boarding services are accompanied by our terms of certified project managers.



Customisation

If there are any areas that you have specific requirements for, that require either new functionality or changes to existing functionality, we can customise ACM to meet your needs. We can develop interfaces for any integrations that you require so that ACM can work with your associated business systems.



Configuration

Customer success team works closely with the customer to configure user stories, ensuring that the customer is skilled up to gradually take over the configuration of the system.



Accessibility

Accessibility is a core principle which is considered throughout our software and solution delivery process. The UK's Public Sector Bodies Accessibility Regulations 2018 stipulates that all digital services should comply to WCAG 2.2 AA level, and all sites and services we develop are tested against these criteria. As well as providing for accessibility and inclusivity, designing, developing and testing websites against WCAG 2.2 AA also has significant benefits to the search engine performance, mobile-friendliness and overall usability of a website or service.

We use a combination of automated testing, manual testing and testing with assistive technology such as screen readers, to make sure our systems and websites comply with WCAG. We will also draft and publish accessibility statements. In line with UK Government advisory, we recommends periodic review of accessibility due to ongoing content changes. We are also able to provide 'experts by experience' testing by arrangement which involves inviting users with a range of disabilities to test the website and feedback on improvements.





Using the Service - Onboarding

Ordering and Invoicing

Requests for more information or to place an order for our Advanced Case Management service, contact PDMS on sales@pdms.com.

We would propose arranging a meeting to find out more about your precise requirements and answer any specific questions you may have. If required, we are also happy to provide an additional detailed proposal which will cover the specific deliverables, approach, timelines etc.

Should we then progress to the order stage, the GCloud call off contract would be signed by both parties. Depending on the solution or service we are delivering, we will also provide a Statement of Work(s) which clearly defines the project deliverables and ensures that we are both fully aligned in terms of the approach and the outcomes.

The minimum contract period is typically 1 year and commences following UAT handover, subject to contract agreements.

Once we have a more detailed understanding of your specific requirements, we can provide a detailed cost breakdown which is usually on a Time and Materials basis. We can also provide Fixed Price quotes depending on the project deliverables.

- Time & Materials services will be invoiced monthly in arrears.
- Fixed Price Projects Payments will be discussed and agreed as part of our onboarding process.
- Recurring fees will be invoiced annually in advance.

Use of the service is subject to the PDMS Terms & Conditions and any terms outlined in the Call Off Contract.

Pricing Overview

You can find pricing information in the Advanced Case Management Service Pricing Document and the PDMS Rate Card.



Implementation Plan

We will hold a number of briefing calls as part of our onboarding process where we will ensure that we have a shared understanding of the project outcomes, the broader project context and to establish agreed ways of working.

As part of our onboarding process, we will provide an implementation plan that may cover the following:

- Project Overview covering objectives and scope
- Project Roles & Responsibilities for stakeholders and key team members
- Project Delivery methodology e.g. Agile, Waterfall
- High level Project Timeline with major milestones etc.
- Risk Management to identify and mitigate any potential risks
- Change Management procedures
- Communication Plan, including channels, frequency and format
- High Level Technical approach
- Hosting (if applicable)
- Documentation and knowledge transfer
- Go-Live
- Post go-live processes such as support and system enhancements

Offboarding

We will agree an offboarding process which will include details of the data that will be provided, the format, any relevant documentation and details of how knowledge and learning can be handed back over to the organisations. Depending on the specific tasks related to offboarding at the end of a contract, there may be additional costs.

Termination Process

Our terms and conditions are tailored to meet the nature of the specific solution, project or service we are delivering to ensure that it best meets our client's objectives. The specific terms relating to contract termination would be agreed as part of the contract award and onboarding process and form part of our final contract.

Our standard termination clause, without cause requires 3 months' notice of termination.

Training

We provide training for our services and solutions in a variety of different ways. We will outline and provide costs for an agreed training plan and knowledge transfer as part of our onboarding process.

We offer several different training approaches including:

- Workshops and training sessions – in person or online
- User guides – including online wikis
- Online video tutorials and how to guides – for self-paced training or as refresher materials

We can also provide in-depth training to “Super-Users” of the solution to support a “train the trainer” approach.





Data Security

We are certified to ISO/IEC 27001, the internationally recognised standard for Information Security Management and are certified under the Cyber Essentials Plus scheme.

In the Isle of Man, the Data Protection Act 2018 makes provisions for the regulation of the processing of information relating to individuals.

The Data Protection (Implementation of GDPR) Order 2018 gives effect in the Island to EU Directive 2016/79 of the European Parliament (General Data Protection Regulation).



Data Back Up & Restoration

We understand the requirements and the comfort that is brought about by backing data up. We have exceedingly high levels of uptime, resilience and redundancy although there are still occasions where data will need to be restored to a previous date.

We have therefore built a backup system which provides continuous recovery points for the data underlying the systems that we have developed. These backups are written to online storage for quick recovery and also regularly taken to tape so as to provide a point in time archive.

The underlying database engine allows point in time recovery, giving an RPO of near zero in the case of data corruption. In the unlikely event of a total system failure our combination of backup strategies (including transactional data backups every 4 hours) supports an RPO maximum of 4 hours.

We perform periodic testing of the backup archives to ensure integrity of the data and restore capabilities.





Business Continuity

PDMS has a robust set of policies and procedures, which form part of an overall Business Continuity and Disaster Recovery Framework to ensure that PDMS is able to provide services to its customers during, and after, significant events that can occur from time-to-time. These policies and procedures form part of PDMS' ISO 27001 and ISO 9001 certified management systems, and as such are externally audited to validate their appropriateness and effectiveness.

PDMS' general approach to business continuity is to ensure that there are no single points of failure within any part of the business.

This ethos means that we make use of multiple, geographical diverse, tier 3+ datacentres to house all of our business-critical data processing units. Our systems are setup in such a way that should a single datacentre fail then customers and PDMS staff should see no loss of service. Should an incident occur then the system will automatically fail over to the other data centre for the provision of services.

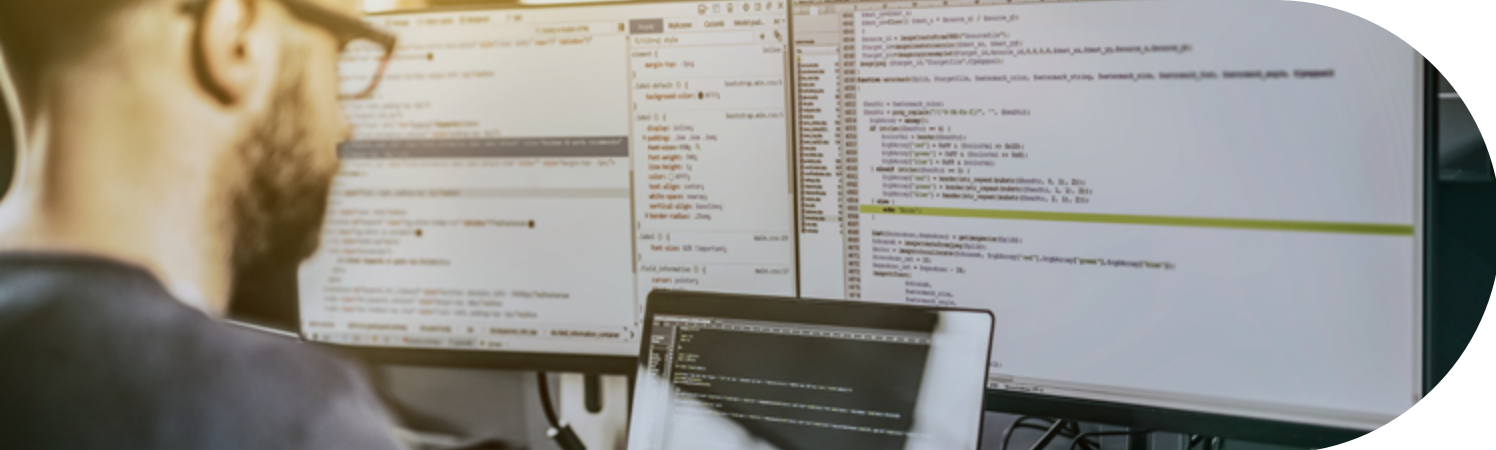
We can provide copies of the various policies and procedures that relate to Business Continuity on request.

Data Protection

We have a dedicated, qualified Data Protection Officer who is responsible for overseeing data protection across the organisation. We have a Data Protection Policy that details how we and our staff will conform to the requirements of the applicable Data Protection Legislation. The Data Protection Officer provides support and advice to each department and ensures ongoing compliance with the legislative requirements through auditing each department. These audits cover all aspects of data protection from collection through to disposal, ensuring that we correctly follow the identified requirements.

We will also, in conjunction with our customers as the Data Controller, provide assistance for any required Data Protection Impact Assessments as part of our services and solutions, which may identify any controls needed that are over and above the standard provision.





Support

We have a dedicated support team providing support for the solutions we have developed. We will agree a support service that meets your specific needs as part of our implementation plan and we provide a support and management contract which outlines our support commitments.

Support is typically available during office hours but can be extended to provide 24/7 coverage if required.

We have a number of channels for reporting support cases including an online system to record, manage and monitor the progress of individual support cases.

We will work with you to identify suitable KPIs for ongoing monitoring to demonstrate adherence to agreed service levels. These will be included within regular project service reports. An example of a typical response time KPI is as follows:

Target achievement of SLA response times

P1 (High): Response within 1 working hour; resolution within 4 working hours.

P2 (Medium): Response within 4 working hours; resolution within 2 working days.

P3 (Low): Response within 2 working days; resolution within 5 working days.

>95%

Account Management

We assign a dedicated Account Manager to all our customers. Our Account Managers, together with our Project Managers are a main point of contact for our customers. They are responsible for contract management and any account queries that you may have over the course of the contract. They will proactively support you to ensure that our services and solutions are delivering the best possible outcomes for your organisation.





About PDMS

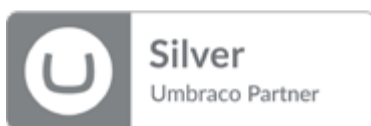
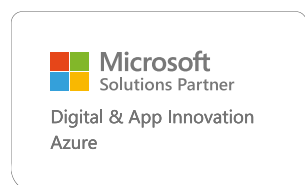
PDMS is a technology company specialising in software development and digital services. With a unique blend of software engineering excellence and creative digital design, we prioritise user-centric solutions. From analysis to ongoing support, we guide clients through every stage of their digital journey.

Our team consists entirely of full-time employees who are committed to continuous learning and skills development. Each member undergoes BPSS checks, with the majority holding SC security level clearance. Our diverse team brings expertise in project management, business analysis, UX design, software development, testing and infrastructure support.

We prioritise customer success, fostering long-term relationships - working with over half of our clients for a decade or more.

With three decades of industry experience, we've honed our understanding of the unique challenges, pressures, and opportunities encountered by the public sector in harnessing technology for maximum impact. Passionate about leveraging technology for tangible outcomes, our digital projects have saved millions, benefiting both public and private sectors while reducing environmental impact and enhancing productivity and customer service.

Accreditations



Memberships





Social Value

Right from the outset, giving back to our local communities has always been important to PDMS. We do this in many ways including fundraising activities undertaken by our generous and enthusiastic staff, corporate charitable donations to local, national and international causes and providing services in kind - for example, a new website for a sporting club or a database for a wildlife charity.

However, what we are most proud of is the time that our team generously gives up to support many community charities and organisations - particularly those that focus on young people. We provide mentors to schools and students, support the work of Junior Achievement and help to broaden the horizons of young people, especially young girls, when it comes to career opportunities in tech. We've welcomed hundreds of students on work experience, placements and apprenticeships over the years and have loved helping young people to learn more about the world of work and grow in confidence.

We want to play our part in protecting our environment too. Our ISO14001 accreditation, is helping us to measure and minimise our impact.

PDMS has committed to achieving Net Zero and has pledged not only to take action to measure, reduce and offset its carbon footprint but to also champion environmental protection within all spheres of influence including biodiversity.

When awarded contracts to undertake work as part of the GCloud framework, we will discuss with the buyer appropriate levels of social value that we could offer that are aligned with the buyer's social value objectives, we also liaise with the relevant buyer project team to see how we can develop and maintain skills as part of any contract. We will look to support the buyer's own social value framework by offering work careers support, mentoring and supporting charities that help women and young girls to progress a career in tech, STEM ambassadors etc.

We regularly take on apprentices across different technical roles and 17% of our current development team started as apprentices.

We will pro-actively seek to openly share our knowledge/ expertise by providing online 'lunch and learn' training sessions on accessibility, agile delivery and UX design. Examples include work experience placements, careers talks & mentoring, diversity & inclusion initiatives and supporting the development of digital skills.



We will provide regular updates on how we are performing in relation to our social value commitments as part of our regular Account Management meetings and will provide an annual report detailing the activities undertaken which have been attributed to a buyer's specific contract and the impact delivered.



Our Clients





Contact Details

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