



Adult Social Care Case Management Cloud

Enablement & Optimisation

Service Definition Document

G-Cloud 15

morson **EDGE**

Adult Social Care Case Management Cloud Enablement & Optimisation

Morson Edge provides public sector organisations with high-impact technical consultancy across a diverse spectrum of technology services. By maximising efficiency, catalysing innovation, and unlocking new opportunities for value creation, we continue to empower the transformation of future-ready public services.

Service Definition for Adult Social Care Case Management Cloud Enablement & Optimisation

We support local authorities to adopt, configure and optimise cloud-based Adult Social Care case management systems. Our approach enables safe, compliant use of buyer-selected platforms to improve case recording, statutory reporting, interoperability, and operational efficiency across Adult Social Care, while retaining local authority ownership of practice and decision-making.

Service components:

- **Discovery:** Discovery and preparation activities establish the current system configuration, data structures, workflows, and integration landscape across Adult Social Care functions including safeguarding, first contact, reablement, long-term support, reviews, financial assessments, direct payments, brokerage, and market management. We will use the outputs of discovery to identify configuration improvements, integration requirements, and deployment scope.
- **Configuration:** We support configuration and optimisation of cloud-based case management systems such as LiquidLogic LAS/ContrOCC, Mosaic, Eclipse/OLM, CareDirector, and equivalent platforms. Activities include workflow configuration, form and assessment setup, automation rules, reporting configuration, and alignment with statutory processes. Where required, secure data migration and validation activities support transitions between environments or modules.
- **Integration:** Integration enablement focuses on supporting connectivity between the case management platform and related systems: health, finance, housing, and partner organisations. Support encompasses the configuration of interfaces, data mappings, and reporting outputs, whilst avoiding dependency on proprietary tooling.
- **Information governance:** Information governance and security are embedded from the outset. We support DPIA development, data protection reviews, and secure configuration of cloud platforms, including role-based access controls, audit logging, and secure handling of sensitive personal data. All activities align with UK GDPR and Adult Social Care safeguarding requirements.
- **Adoption:** Adoption support is limited to enabling effective use of the cloud case management system. This includes role-based system training, configuration guidance, and support materials to help practitioners and managers use configured workflows appropriately within their statutory responsibilities.
- **Optimisation:** Optimisation and reporting outputs provide local authorities with actionable insights that drive continuous improvement in system usage, enhance data quality, and support informed operational decision-making. They help identify trends,

highlight areas for improvement, and ensure that the case management system delivers maximum value across Adult Social Care operations.

Our project management and delivery approach for Adult Social Care Case Management Cloud Enablement & Optimisation provides structured governance, clear accountability, and controlled delivery – aligned to statutory and assurance requirements – through end-to-end implementation and transition to live service.

Morson Edge does not provide general consultancy, Care Act advisory services, staff augmentation, or outsourced Adult Social Care delivery. Ownership of statutory practice, decision-making, and service outcomes always remains with the local authority.

Service Features

- Configuration and optimisation of buyer-selected Adult Social Care case management cloud platforms.
- Support for LiquidLogic LAS/ContrOCC, Mosaic, Eclipse/OLM, CareDirector, and comparable systems.
- Workflow configuration aligned to Care Act and safeguarding processes.
- Secure data migration, validation, and configuration support.
- Reporting, dashboards, and statutory return configuration.
- Integration enablement with health, finance, housing, and partner systems.
- Role-based system training focused on effective cloud usage.
- Information governance, DPIA, and data protection configuration.
- Release, upgrade, and configuration change support.
- Scalable deployment model across service areas.

Service Benefits

- Improved statutory compliance through consistent system configuration
- Faster, more accurate case recording and assessments.
- Improved data quality supporting audit and assurance.
- Better interoperability with NHS and partner organisations.
- Reduced administrative burden for practitioners.
- Improved operational visibility of demand and capacity.
- Increased confidence in use of digital case management systems.
- More effective use of existing cloud platforms.
- Improved reporting for finance, performance, and safeguarding.
- Foundation for future digital innovation in Adult Social Care.

Exit, Transfer, and Portability

- All data remains the property of the customer at all times.
- Data and configuration documentation can be exported in standard formats.
- The service does not restrict supplier change or internalization.
- Exit does not require ongoing paid support or proprietary tooling.

Information Assurance

Morson Edge's information assurance capabilities support both our internal requirements for appropriate security controls and those of our customers. Our diverse portfolio of projects and customers mean that we have extensive experience in working with information and systems at all impact levels (IL 0 to IL 6+). We are a Cyber Essentials Plus certified organisation.

Data Restoration / service migration

We assist our customers in the migration of data from legacy solutions to new cloud solutions.

On-boarding and off-boarding processes / scope

Morson Edge agrees specific on/ off-boarding processes for all work packages. Agreed processes are always tailored to the individual requirements of the assignment in question. Requirements are clearly defined with the relevant customer stakeholders in order to ensure the effective transition of individuals or teams alongside the management of data, assets, corporate memory and operational integrity.

Combination pricing

Morson Edge can provide multiple services in scope of G-Cloud Support Services. Our services can be bought separately or together. Combination pricing is offered accordingly.

Service management

A Service Account Manager is allocated to each customer's engagement. This individual is responsible for overseeing the services in scope of the engagement. This individual closely monitors the engagement's progress, ensuring that any risks or issues are managed appropriately to ensure that all activities are delivered in accordance with the agreed assignment scope, key deliverables and timeframes. Through structured customer relationship management, our Account Manager remains in regular contact with the customer to ensure their ongoing satisfaction.

Service constraints

Bespoke services, such as those in scope of G-Cloud 15, Cloud Support Services, are not subject to specific service constraints.

Service levels

Morson Edge recommends that we enter into performance-based Service Level Agreements with each of our customers. The implementation of bespoke service levels represents the positive obligation of both parties to deliver a mutually beneficial partnership which supports end user activities and facilitates effective measurement and monitoring of the assignment. Due to the diversity of services in scope of G-Cloud 15, Cloud Support Services, service levels must be closely tailored to each engagement. Agreed service levels form part of the Call-Off agreement which renders us contractually bound to deliver the agreed service levels.

Knowledge Transfer

Wherever possible, Morson Edge ensures disciplined knowledge and skills transfer from the consultant(s) to the customer through structured knowledge capture, documentation standards, and handover planning through all delivery phases. This ensures that learning is transferred to the customer as the engagement progresses – empowering the customer and

ensuring the ongoing efficiency of the assignment and full embedding of the new system/service.

Ordering and invoicing

Morson Edge is an approved and accredited supplier to multiple CCS frameworks. We are used to working with customers to agree tailored ordering and invoicing processes. Payment terms are 30 days from receipt of invoice.

Termination terms

Morson Edge's standard terms and conditions include clauses which facilitate contract termination by either the consumer or the supplier.

By the consumer	By the supplier
Termination can commence without notice in the event of a customer citing dissatisfaction with the service provided and the issue not being rectified within an agreed timeframe, or in the event of a material breach of contract.	In the unlikely event that Morson Edge was to withdraw from G-Cloud 15, Cloud Support Services, a minimum 30 days' notice would be served. Ongoing assignment commitments would be maintained through to completion in accordance with the terms of the Framework Agreement.

Customer responsibilities

Customer responsibilities are closely aligned to the assignment and as such, these must be discussed and agreed with the customer prior to the commencement of the assignment. All responsibilities are clearly cited within the Call Off contract.

Service dependencies

Service dependencies are specific to each Call-Off. Such detail must be discussed and agreed with the Customer prior to the commencement of the engagement.



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