Schedule 1

ISCF HIGH LEVEL DATA MANAGEMENT, FUNCTIONALITY AND SYSTEM DEVELOPMENT REQUIREMENTS

The table below sets out the broad data management requirement that will be necessary to support the functions of the Business Health Matters (BHM) ISCF Project.

The specifics required as a minimum of the system being procured are highlighted in green. Other data management capabilities that the supplier can meet with the system will be assessed for their potential benefit.

Data Type		Information System Required	Broad data types
EMPLOYERS			
	Potential Customers	Database of businesses in Lancashire	Possibly use database of another organisation (Chambers of Commerce, LEP, etc)
	Engaged customers	Sales records of businesses engaged with	Contact name / email, sales numbers to that business, prompts for follow ups or rescreens
	Signed up customers	Register of businesses signed up to take screening service	Business Sector/ Locations/details of workforce/target types of employees
	Screening programme by Business	Record of the programmes of screening undertaken for each business	Dates & Times/ Number of Employees/Number engaged in Wellbeing Support/Rescreening
EMPLOYEES			
	Pre-screening and post screening evaluation	Questionnaires (including issuing to employees)	Q. issued by email / Completed Q able to integrate back into system
	Screening	Database of screening undertaken and results	Invitation(s)/attendance or DNA/screening result record/quality
	Wellbeing Support Plan	Database of wellbeing support plans	Personal identifier/ screener/plan/attendances/ Reviews/outcomes/quality/ Referrals on
SCREENING PROVIDERS			
	Screening Providers	Records of the screening providers	Name/ Contact Person/ Number of trained screeners & capacity/ locations screeners can work in/
SCREENERS			

	Screeners	Records of screening staff	Identifier details of trainers/qualifications/training undertaken/ accreditation/training update requirements
	Screener's activity	Records of Screenings undertaken	Screening undertaken (linked to individual employees)/ wellbeing follow ups undertaken
WELLBEING PROVIDERS			
	Wellbeing provider organisation information	Record of information for each provider	Provider organisational details (organisational status/purpose/locations/insurance/key staff/contact info)
WELLBEING SERVICES			
	Service type	Record of each service type	Nature of service/location(s)
	Service availability	Up to date details of service availability/ Directory of Services	Access information including timings/appropriate users/session capacity/ frequency
	Service delivery	Database of Service provision	(Links to employee data on) attendances/progress/ outcomes/quality
TRAINING FOR SCREENERS			
	Training	Record of training	Availability of training/screeners trained/accredited/not accredited/retraining provision

FUNCTIONALITY

The system will be required to deliver the following functionality as a minimum, in addition to acting as a database for the data identified above. Additional related functionality will be considered as potentially beneficial.

Customer (Active Lancashire) configurable data fields	Data fields should be customer configurable wherever feasible
Screening and wellbeing client administration	Ability to create and manage
Management Reporting	Generating relevant management reports, including activity, quality measures (based on questionnaire responses as a minimum), outcomes, client segmentation etc. Customisable reporting suite with aggregated data / reporting tools for third party access
Ability to generate onward referrals	Export of referral to leisure providers / external providers with documentary evidence of referral being sent.

Exporting information to Customer Relationship Management System	Export to integrate data on Screening Providers, Trainers and Wellbeing Providers and their staff with the employee records held within the system being procured
Questionnaires	Production of questionnaires with system ability to contact employees to be screened by their chosen method (email / text) and automatic upload of these questionnaires back into the system. Ability to send screening results to employees in report form.
Compatibility	Compatible with most systems, equipment and upgrades.

SYSTEM OPERATION

Requirements of the supplier and system proposed:

The system must be accessible from existing hardware within Active Lancashire, and it must be accessible from mobile technology (4G and WiFi enabled tablets), using secure login for both types of access.

The system must have the current capability to integrate with a future CRM system in use within Active Lancashire. The supplier must demonstrate a current ability or commitment to integration on a wider range of systems in the future.

SYSTEM DEVELOPMENT

The supplier must have the capability and ambition to participate in future development of its system with other partners that may be engaged by the Business Health Matters programme.

The supplier must have the necessary security in place to satisfy NHS toolkit requirements such that an upload link could be developed if required and resources allow, to enable information to be extracted and loaded into NHS systems, particularly the EMIS system used by General Practice, but potentially other systems too (for example Social Prescribing systems).

The supplier must have the potential to support roll out of its system outside Lancashire. This will include to Cheshire and Greater Manchester during the period of the contract, and potentially other areas of the UK after the contract end date.