Implementation proposal outline

A starting document for scope discussion. Complete and approve the commercial terms before work begins.

Project / organisation

Named project contact

Intended product and task

Project goal

Source and target systems, where relevant

Service areas to agree

- ☐ Set up a product
- ☐ Connect your systems
- ☐ Move data with a plan
- ☐ Prepare your team

This is an unpriced outline, not an accepted offer. Do not include health records, credentials or confidential source exports.

Scope and handover

Set up a product

Inputs: Product, intended users and authorised project contact; Access to a test environment and an agreed configuration brief

Proposed deliverables: Configuration record and agreed setup; Task-based acceptance walkthrough; Administration notes and handover

Outside scope: Product licensing or clinical validation; Custom features outside the agreed brief

Connect your systems

Inputs: Named source and destination systems with API documentation; Authorised technical contacts and approved test data

Proposed deliverables: Data-flow and field-mapping specification; Agreed connection and failure/retry checks; Connection documentation and handover

Outside scope: Unapproved access or unrestricted access to patient records; Third-party API changes and unrelated system replacement

Move data with a plan

Inputs: Authorised source export and target specification; Agreed retention, mapping and reconciliation requirements

Proposed deliverables: Mapping and migration runbook; Test migration and reconciliation report; Agreed cutover, rollback and handover plan

Outside scope: Clinical interpretation or alteration of original responses; Unagreed data repair or deletion of source records

Prepare your team

Inputs: Team roles, product tasks and learning needs; Access to an agreed demonstration environment

Proposed deliverables: Role-based walkthrough and task checklist; Agreed session materials and reference guidance; Handover and outstanding-question record

Outside scope: Clinical qualification or accreditation; Unreviewed assessment or therapeutic teaching content

Agreement checklist

Scope and responsibility

Name each party, authorised access, included tasks, exclusions and dependencies.

Test and acceptance

Agree a test environment, task-based checks, reconciliation where needed, an exception record and who accepts handover.

Delivery and handover

Agree milestones, dates, documentation, administration responsibilities and the support route.

Change control

Record a proposed change and its effect on scope, price, dates or dependencies before authorising extra work.

Quotation reference / agreed price

Dates / capacity / third-party costs

Support terms / acceptance contacts

Commercial terms remain unfilled. A written quotation and agreed acceptance are required before delivery. No clinical suitability, accreditation or product approval follows from implementation support.