



Making Healthcare Better

HBSUK Quality Account

A document prepared by
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1 PART ONE – Statement from the Executive of HBSUK

1.1 What is a Quality Account?

A Quality Account is an annual report about the quality of services provided by a healthcare organisation.

Quality Accounts aim to increase accountability and drive quality improvements in the provision of healthcare services. Our Quality Account looks back on how well we have done in the past year at achieving our goals. It also looks forward to the year ahead and defines what our priorities for quality improvements will be and how we expect to achieve and monitor them.

The quality of services provided is measured by reviewing:

- Patient Safety
- How effective are patient treatments we have delivered.
- Patient feedback on care provided.

Throughout the document we have used the terms patients to mean any person who has used or will use our services.

1.2 Introducing HBSUK

Healthcare Business Solutions (UK) Limited (HBSUK) is the only UK provider of consultant-led digital and physical health solutions that can straddle primary and secondary care.

Our mission statement is: ***“Making Healthcare Better.”***

HBSUK has continued to grow over the last 12 months, finding new ways to improve the lives of our end customers, our patients. HBSUK are the only provider in the UK who delivers services to NHS and Private patients and can deliver this digitally and physically. Maintaining our roots, we continue to grow and expand our in-source offering, from single specialty support to multi-speciality support covering clinics, diagnostics, day-case and in-patient surgery.

In parallel we have rapidly grown our digital services, covering initially MSK and dermatology, however during Covid when most elective care was closed, we covered most medical specialities aside from Mental Health.





We are experts in clinical pathway management through technology, innovation, and clear patient focus.

- We specialise in finding innovative solutions to complex problems.
- We are distinctive both in our innovative solutions and how we use our clinical network to bring together the right people to meet the need of our clients and patients.
- We constantly strive to make our clients aspirations possible by delivering the right solution when they want it, when they want it.
- We improve the care journey for our clients, for patients and for our colleagues.
- We are original and always looking for quicker and smarter ways of meeting the needs of our clients and patients.

HBSUK aims to be the leading provider of blended digital outpatient services across all specialities.

Our mission statement is: **“Making Healthcare Better.”**

Our EPIC Values define the way we work and we achieve our purpose by never compromising our values.

			
<h3>Excellence</h3> <p>We aspire to be the best at what we do and to lead by example. We set high personal and company standards, and then consistently try to exceed them. We support each other and put quality as a top priority.</p> <p>At HBSUK we don't settle for anything less than excellence.</p>	<h3>Patient Focus</h3> <p>Patient care is at the heart of all we do and is central to our decisions. We are always committed to excellence for our patients and achieve it through innovation and endeavour. Shared decisions, for me, about me are made between clinicians and patients.</p> <p>At HBSUK the patient always matters most.</p>	<h3>Integrity</h3> <p>We value our staff and our clients. We listen to their views and respect them. We don't prescribe what others should do but we do expect everyone to deliver and uphold our standards.</p> <p>At HBSUK we care about what we do and can be trusted to deliver.</p>	<h3>Collaboration</h3> <p>We are generous with our time, our attention and our ideas, giving in a positive spirit to help each other stretch, grow and take risks. We work tirelessly to create an equitable place where no person is disadvantaged based on race or gender.</p> <p>At HBSUK we work together and support each other.</p>

Our performance is measured every year on how well every member of staff has embodied these values in delivering their objectives.

1.3 HBSUK Business Activities

The services that we offer in our business are:

- **Insourcing of Clinical Services**
- **Accelerated Specialist Assessments using Virtual Lucy®**
- **International Recruitment**

1.3.1 Insourcing of Clinical Services

HBSUK has been successfully and safely providing insourcing services to the NHS for over 10 years, as the longest established insourcing company in the UK. We have an unbeatable track record and have delivered over three thousand operating days within the UK, completing over forty-five thousand procedures, and delivering over one hundred thousand physical outpatient appointments. In addition to this we have now completed over ten thousand remote specialist assessments, and we have operated entire ophthalmology services.

We have a network of over one thousand consultants, and we are present on eleven NHS frameworks for insourcing and pathway re-design.

1.3.2 Accelerated Specialist Assessments using Virtual Lucy®

HBSUK has developed the Virtual Lucy® digital clinical pathways platform to provide a new way of delivering outpatient services across a range of specialties. The solution enables a single point of access into a trust for all specialties and then a flexible triage process will quickly stratify the inbound patients and determine the best

course of actions for them. In many cases this will involve immediately discharging the patient with Advice & Guidance and remove the need for any kind of assessment. Secondly the patients are asked to complete a consultant designed questionnaire that will further assist the clinician when carrying out an assessment of the case prior to determining any next actions; next actions could be a request for diagnostics and scans, further information requests or a video call appointment.

In implementations of Virtual Lucy® in Dermatology we have seen incredible results with only 34% of patients requiring a face-to-face first appointment and another 34% also went straight to treatment or discharge being able to be supported without any face-to-face appointment. Over 6% of patients using Virtual Lucy® were diagnosed as having a form of cancer which is higher than the average two week wait group of patients seen in standard face to face services. Less than 20% of patients who were offered Virtual Lucy® as a route to treatment declined and over 85% said they would recommend a digital pathway to family and friends. Also, when using the digital pathway over 51% of patients had the clock stopped after their first appointment showing that efficiencies can be gained from implementing robust “direct to test” digital pathways.

Throughout 2023 we will be using the expertise of our Medical Advisory Board to help us develop the digital tools to enable Virtual Lucy® to support most specialties and delivering thousands of hours of extra capacity into the system using our unique blended approach.

In addition to this we build Virtual Lucy® as a fully interoperable solution “from the ground up” with a technical architecture that is 100% aligned with NHS digital strategies and NHS adopted data standards. This means that Virtual Lucy® can be deployed as part of an ICB or Trust digital strategy and will be fully able to operate within a trust’s technical ecosystem.

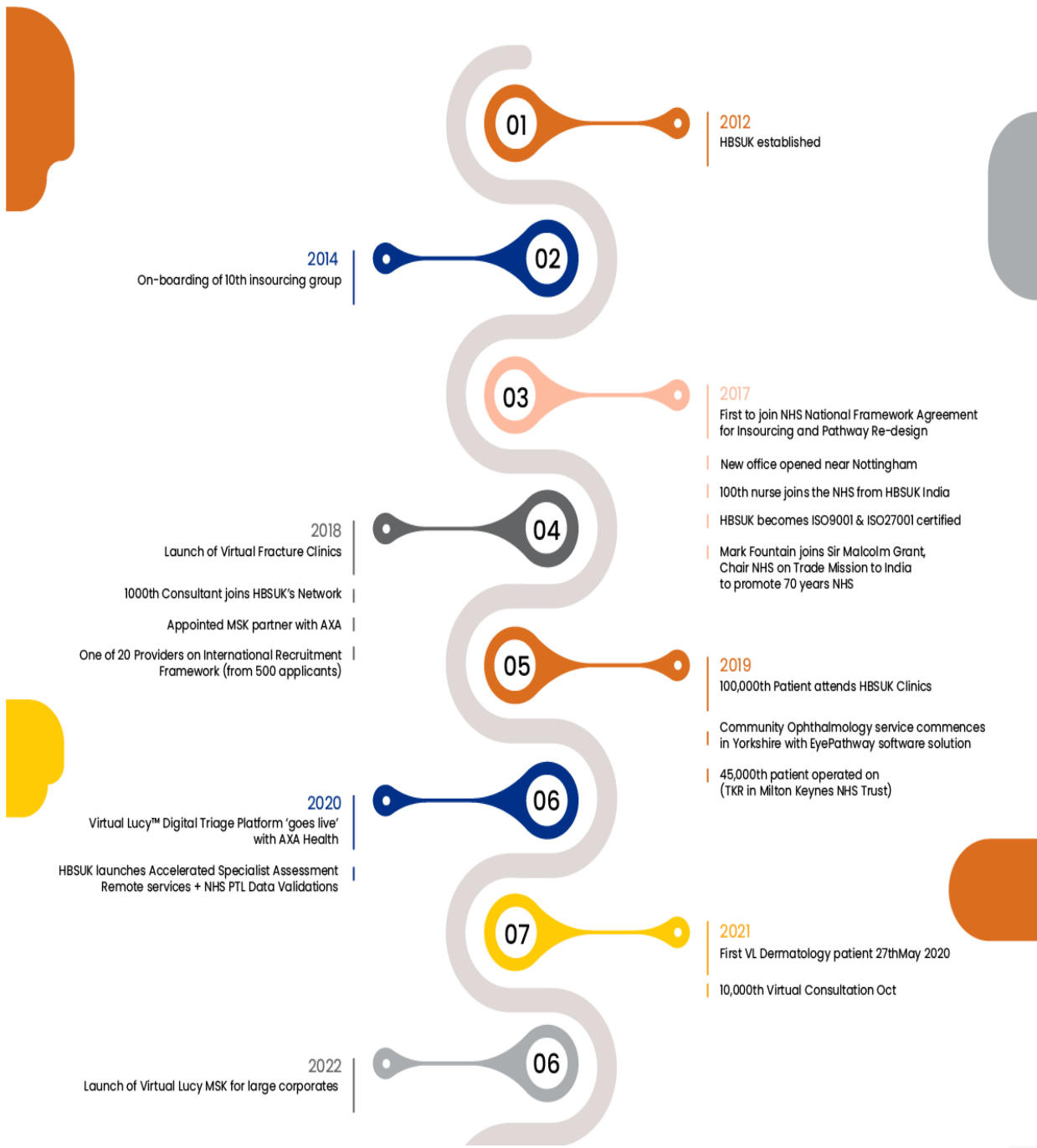
We expect to see a significant expansion in the uptake of Virtual Lucy® as the NHS struggles to cope with increased demand and looks for extra capacity to be released from digital innovation rather than increased staff numbers, especially in services where there is a shortage of consultants, such as Dermatology.

1.3.3 International Recruitment

HBSUK is also a provider of clinical staff to many NHS organisations throughout the UK through its extensive links to the international nursing market. Our international recruitment team are currently sourcing many scarce roles for NHS trusts from their wider network including Midwives and AHPs.

HBSUK is a values driven organisation and every person who is located is greeted and augmented into the UK by our international recruitment team to ensure they have the best experience of coming to work here and the NHS gets an effective and motivated staff member.

HBSUK History timeline:



1.4 Executive Team

Our executive team works hard to ensure that the services we deliver are safe, effective, and providing the best possible patient experience. We are extremely proud of our results and our teams who continue to deliver excellent services for customers and patients.



Mark Fountain
Executive Chairman



Garry McCord
Chief Executive Officer



Charles Byrne
Managing Director



Mark Emerton
Chief Medical Officer



Lucy Pittaway
Director of Insourcing



Lucy Cassidy
Product Director



Michael Monk
Chief Financial Officer



Alex Nancekievill
Chief Technology







Rebecca Eccles
Executive Assistant

1.5 Medical Advisory Board

HBSUK places great emphasis on the involvement of senior consultants and clinicians in all clinical matters related to the delivery of exemplary insourcing activities and to the provision of digital clinical pathways through Virtual Lucy®.

We have therefore recruited several senior clinicians to be part of our Medical Advisory Board (MAB) across a wide range of specialties and offering their advice and expertise in support of our business activities and the delivery of the best possible services. Members of the MAB support our Virtual Lucy® product by providing the content for our digital clinical pathways.

Current MAB Members:

Professor Stephen Smith	Gynaecology & Women's Health	Originally a clinician scientist with a Chair in Cambridge, became dean of Medicine at Imperial College and created Academic Health Science Centres in the UK, becoming CEO of Imperial College Healthcare NHS Trust. Founding Dean of new Medical School in Singapore. Steve provides international advice on health reform.
	Dermatology	Prof Mark Goodfield is HBSUK's Medical Director for Dermatology. He is also former president of the British Association of Dermatologists. Mark Practices in general dermatology with an interest in the diagnosis and management of systematic diseases, skin cancer and paediatric dermatology. He works closely with other disciplines in clinical and laboratory research in these areas.
Professor Mark Goodfield		
	Neurology	Dr David Francis holds a PhD in immunogenetics of MS and has been the principal investigator for clinical trials involving disease modifying treatments for MS.
Dr David Francis		
	ENT	Paul is a consultant ENT surgeon. He has won a number of awards and prizes for his contribution to the field of ENT, such as the Silver National Clinical Excellence Award from the NHS, the British Medical Association ENT Book Prize, the Cutler's Surgical Prize by the City of London and The George Davey Howells Memorial Prize from the University of London.
Mr Paul Montgomerie		
		

Dr Max Pitcher



Gastroenterology

Elected as Chairman of Medicine at St Mark's in 2007 and appointed Chairman of the Medical Advisory Committee at The Clementine Churchill Hospital in 2010 for five years.

As the Concertmaster for the European Doctors Orchestra, Max is also an accomplished violinist.

Mr Paul Trikha



MSK

Mr Paul Trikha has vast experience in MSK leadership and management.

He has undertaken various specialty and clinical lead roles including Clinical Director of MSK Strategy and Transformation and MSK Clinical Lead for Surrey Heartlands STP.

Paul is also a co-founder of the Surrey Orthopaedic Clinic.

Dr Dan Blackman



Cardiology

Daniel is a consultant cardiologist. He is the highest volume operator in coronary intervention in Leeds.

Daniel is leading the Leeds Programme in valvular intervention. He also has a broad interest in all areas of general cardiology including chest pain, palpitation, hypertension, and arrhythmias.

Dr Masood Nazir



General Practice

Medical Director Integrated Care and Chief Clinical Information Officer - NHS Birmingham & Solihull ICB.

Masood is passionate about creating a joined-up health system for patients, which will lead to better, safer, more effective care. He firmly believes that this can be achieved through effective sharing of health information and use of available innovative technology.

1.6 Patient Insights

During 2023 HBSUK intends to model best practice in terms of being 'patient-centred'. This means ensuring:

- That we focus on what matters to people who want to access our services and those who use them
- That we work with patients, carers, and the public as equal partners in the design and delivery of our services.

We are developing an engagement strategy that enacts the above across our research, education, and service functions. Building on the patient and clinically-centred development of our products and services, we want to

adopt a strategy that ensures shared decision-making at all levels – from the frontline, through improvement work, governance, and senior decision-making.

We now have a fully functioning Insights Team that will help embed the culture, systems, and processes to be truly patient-centric. We are conducting four studies to kick off the initial insights work; gathering feedback and data to provide learning for further development of the new offerings across chronic conditions. These are:

Study 1 & 2 - Two Focus Groups exploring the lived experiences and perceptions of those choosing or not choosing to use technological solutions in healthcare. The second focus group will include Virtual Lucy® users. These studies will be in collaboration with Prof Lucie Byrne-Davis from Manchester University. We will need to gain ethical approval before we embark on these studies. We will also submit these manuscripts for publication.

Study 3 - We have currently developed a Knowledge, Attitudes, and Perceptions Questionnaire to explore HBS UK Virtual Lucy®, service users. This is currently being finalised and will be sent out to service users in April.

Study 4 will focus on a PREMs and NPS report on patient experience. An infographic report will also be produced and made available in April.

We have a consultant Patient Director (David Gilbert) to help develop a co-design group who will co-produce and provide PPI in our Insight Studies. Additionally, a Terms of Reference (ToR) and engagement strategy as mentioned previously is also being developed and led by our Patient Director.

1.7 Statement from our Executive Team

This year has seen considerable growth, with the business expanding by over 50% as we enhance our existing insourcing and digital triage services to more specialties. We continue to strive to deliver the very best patient care through the combined efforts of our dedicated and committed teams alongside our MAB and the NHS. Our investment in our Virtual Lucy® platform has allowed us to deliver a modern and transformational outpatient experience that improves throughput, and we believe achieves a better outcome than a face-to-face appointment.

This Quality Account meets the requirements set out by the Health and Social Care Act 2012 and the Care Quality Commission (CQC). It reports on the quality of our services during 2022/22 and key areas of accountability, including: safety, effectiveness of treatment, clinical quality, safeguarding and patient experience.

1.8 Statistical Overview

The following statistical information gathered from our Virtual Lucy® platform indicates the significant level of clinical activity that is being delivered through the platform:

Description	Value
Total no. Virtual Lucy® appts	36,093
Average PREMS – 1 st appointment	4.6
Average PREMS – FU appointment	4.7
No. Virtual Lucy® appointments offered within 1 working day	28,063
No. Virtual Lucy® appointments offered within 2 working days	29,083
Appointment SLA – Physio (1 working day)	99%

Appointment SLA – AP (1 working day)	99.8%
Re-referral Rate following treatment on Virtual Lucy®	2.3%
Total no. of surgeries (insourcing)	5225
Total no. patients worked through insourcing	15660
Percentage of complaints in relation to VL cases	0.16%

2 PART TWO – Improving our Quality of Service

2.1 Performance against our Quality Objectives for 2022

2.1.1 Staff Satisfaction

HBSUK values the overall welfare and happiness of the team of employees. Staff satisfaction creates higher morale, lower turnover, greater attractiveness to candidates, increased productivity, and reduced absenteeism.

Employee satisfaction is affected by various factors such as company culture, senior leadership, training, and career opportunities, among others. HBSUK keep these aspects in mind while making decisions and follow the below best practices:

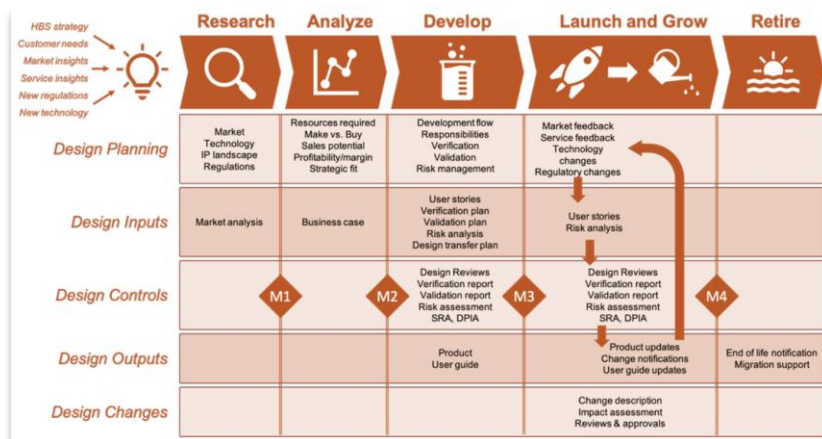
- Create a positive work environment through open communication and promoting equal opportunities.
- Define goals and objectives clearly through job descriptions and annual performance reviews.
- Provide feedback to employees through regular meetings with the line manager.
- Promote work-life balance with part-time and/or remote working options.
- Engage employees with regular briefings from CEO and annual staff day.
- Help employees to develop skills through specific training.

HBSUK evaluate and measure employee satisfaction through an annual survey. It contains questions on teamwork, training, role satisfaction, management support, and so on. Through this survey, HBSUK track the Employee NPS (e-NPS) by asking employees the following question “On a scale of 1-10, how likely are you to recommend Healthcare Business Solutions (UK) as a place to work?”. Employees then answer on a scale of 1-10, 1 being not likely and 10 being extremely likely. The HBSUK e-NPS for 2022 was +40, based on the responses collected. The national average benchmark for e-NPS is +12; a score between 10 and 30 is good with a score over 30 being considered excellent.

2.1.2 System Development (Virtual Lucy®)

HBSUK provides digital triage and remote specialist assessments through the Virtual Lucy® platform. In 2022 HBSUK invested heavily in the development of the platform and the growing Product Development Team.

Virtual Lucy® is a platform that is constantly evolving to meet the growing needs of the business, our clinicians, and our patients. HBSUK follows an agile design process with 3 releases annually, following the below design and development process.



Virtual Lucy® 2022 Features

Throughout the year, many new features have been launched with each release. Following are some of the new feature examples:

Release 1	Release 2	Release 3
<ul style="list-style-type: none">• Dermatology case reviews• Validation check against duplicate cases• Update to consent policy.• Time zone support	<ul style="list-style-type: none">• Clinician ranking engine.• Accessibility fixes• Manual referral letter access	<ul style="list-style-type: none">• Electronic private prescription• Smartphone app notifications• Flexible appointment lengths• 360 view of the patient

Virtual Lucy® Enhancements – How

As the Product & Development teams have grown the capacity for new features has grown each release. All departments within HBSUK are given the opportunity to feed into the roadmap and future developments. Smaller workshops are used for individual feature design and relevant teams are invited to test out new features and provide feedback before the release to ensure that the features are always fit for purpose.

Patient feedback is collated through the year from the customer service team and fed into the enhancements and new features. In 2023 we have added a Patient Insight function to further enhance our design process.

The success of new features is tracked using our MI reports in Virtual Lucy. Each release has an associated MI report to track the enhancements to ensure that we can see where features have made efficiency, behavioural, service provision and financial growth opportunities.

2.1.3 Continuous Development of Policies

HBSUK believe that policies and procedures help to build a stronger corporate culture. Therefore, we have successfully implemented new policies throughout the year.

Medical Emergency on Virtual Calls Policy

HBSUK is committed to maintaining the highest safety standards for the patients. The purpose of this policy is to ensure that HBSUK clinicians working in virtual services have access to a best practice framework to manage a patient collapse / medical emergency on a virtual video call.

This policy describes the actions staff should take to ensure emergency care provision during a medical emergency on a virtual video call. The aim of the policy is to ensure that staff understand and can facilitate appropriate treatment in the event of a sudden deterioration of a patient or need for resuscitation.

This policy was developed in collaboration with the HBSUK Medical Advisory Board (MAB) and the British Resuscitation Council to ensure timely and effective management in the event of a patient collapse or medical emergency on a virtual appointment call.

MHRA Safety Alert Policy

This policy outlines HBSUK's processes for receiving, identifying, and distributing patient safety alerts, important public health messages and other safety critical messaging throughout the organisation. In doing so HBSUK will ensure that robust and effective systems are in place, guaranteeing that the patients in our care always receive care in line with the most current best practice principles.

It is the aim of HBSUK to ensure that all alerts and product recalls are communicated promptly to all relevant members of staff employed within HBSUK; and that actions, to comply with alerts, are taken within the identified time scales; to safeguard patients, visitors, and staff from harm.

Fit and Proper Person Policy

This policy outlines the process within HBSUK to administer and review the Fit and Proper Persons Test. Under this policy the Directors and Senior Leadership Team (SLT) are required to demonstrate that they are Fit and Proper Persons under Regulation 5 of The Health and Social Care Act 2008 (Regulated Activities) Regulations 2014.

Directors and the SLT within HBSUK have significant authority within the business, in that they are directly responsible for the overall quality and safety of the care delivered by the business.

To meet compliance with these requirements, HBSUK continually ensures that there are robust processes in place to assess the suitability of directors and SLT members at the point of recruitment and throughout their ongoing employment. HBSUK also have effective arrangements in place to tackle issues should any concerns be raised about a directors' or SLT members ongoing fitness and suitability to carry out any such role.

Maternity, Paternity and Adoption Policies

It is the policy of HBSUK to ensure that, as far as possible, employees can combine their career and family responsibilities.

The Maternity Policy sets out the statutory rights and responsibilities of employees who are pregnant or have recently given birth. The Company implements the maternity rights set down in legislation.

The Paternity Policy recognises the importance for employees to support their partners following the birth of their children. It provides employees with the time they need to care for their new-born.

The aim of the Adoption Policy is to inform employees of their adoption rights and entitlements and to outline HBSUK's adoption leave and pay procedures.

The employee and his or her spouse/partner may be eligible for Shared Parental Leave (SPL), which gives employees more flexibility to share the available leave and pay in the first year.

Personal Relationships in the Workplace Policy

This policy outlines HBSUK's policy on personal relationships between employees and is in place to ensure that no conflict of interest arises.

These principles apply to all employees regardless of their job or level of seniority.

It is intended to provide an outline of the expectations placed on members of staff and their managers so that such situations are dealt with fairly and consistently. It is also intended to protect staff so that they are not open to allegations such as impropriety, bias, abuse of authority, or conflicts of interest.

2.1.4 Implementation of the Equality, Diversity, and Inclusion Strategy

Appointed new Lead for EDB

Rachael Machin (AP Clinical Lead) has previous experience in EDB, having served a 4-year term on the Chartered Society of Physiotherapy Council as Equality Representative and developing and delivering training to the 6,000 staff of the NHS Trust she previously worked for.

EDB policy

The new Equity, Diversity and Belonging Policy has been approved and is now in place and replaces the previous Equal Opportunities, Harassment, Bullying and Discrimination and Disability Discrimination policies.

Pronouns

We have e-mailed all employees to advise them that HBSUK supports them in using their pronouns in signatures and social media biographies. This is an important move towards real inclusivity in the workplace and wider society. It helps avoid getting someone's gender wrong and supports trans and non-binary employees by reducing some of the burden on them to continuously explain their identity.

Strategy

Rachael is leading the HBSUK strategy development which will include instigating monitoring, setting up an EDB working group and looking at increasing the accessibility of Virtual Lucy® using Equal Web.

2.2 Quality Objectives for 2023

Throughout the year, progress against our quality objectives will be monitored by HBSUK's Executive Team.

2.2.1 CQC Registration

Secure Care Quality Commission (CQC) Registration	
CQC is the independent regulator of health and adult social care in England. Their purpose is to ensure that care services are monitored, inspected and rated. A CQC rating is a clear indicator of the status of the service being delivered by the inspected organisation.	
How objective will be achieved	How objective will be measured
Achieve CQC compliance for HBSUK product/service portfolio.	Pass inspection by April 2023 and register with CQC.

2.2.2 EFQM 3-Star Rating

Achieve European Foundation for Quality Management (EFQM) 3-star rating	
The EFQM model provides a framework for measuring strengths and areas for improvement of an organisation across all its activities. EFQM is another step towards Excellence (E from E.P.I.C. values).	
How objective will be achieved	How objective will be measured
EFQM training for 3 people in business plus modification of internal processes to reflect the EFQM framework.	Pass first self-assessment by end of June 2023 and 3-star rating by December 2023.

2.2.3 ISO13485 Standard

Compliance with ISO13485 Standard
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The ISO 13485 standard (Medical devices – Quality management systems – Requirements for regulatory purposes) is an internationally agreed standard that sets out the requirements for a quality management system specific to the medical devices industry. It ensures all medical devices meet the proper regulatory compliance laws and customer needs.	
How objective will be achieved	How objective will be measured
Complete gap analysis of the standard with organisation’s current activities. Act on the gaps identified and get external support for implementation, if required.	ISO13485 standard certification

2.2.4 Maintain Excellent Customer Satisfaction

Maintain high customer satisfaction	
<i>The customer is at the heart of all we do and is central to our decisions. We are committed to provide high-quality services to all our customers. We are aiming for the following metrics:</i>	
<ol style="list-style-type: none"> 1. PREMS > 4.7 2. NPS > 8 	
<i>The aim of this data collection and scoring will be to constantly evaluate customer feedback and turn this into positive actions to keep improving the position. In addition, we will use the feedback to adjust, enhance and extend the services we offer.</i>	
How objective will be achieved	How objective will be measured
Introduce Trust Pilot Analysis and NPS alongside PREMS.	Measured by regularly extracting and reporting on TPS, PREMS and NPS. Ensure methodology encourages high % feedback for statistical data relevance.

2.2.5 Clinical Research

Participation in Clinical Research	
<i>Clinical research is at the heart of the NHS and of progress in healthcare. We will therefore aim to commit employee time to the activity of clinical research linking with exemplar organisations.</i>	
How objective will be achieved	How objective will be measured
We will employ a new research team and engage in research activities by forming partnerships and developing relationships with organisations whose work is specifically aligned to this activity	Evidence of clinical research activities will be present with published papers and reports.

3 PART THREE – Review of Quality Programme

3.1 Patient Safety

We actively promote the reporting of security incidents, breaches or suspected incidents and breaches. Reporting of information security incidents helps maintain a safe and secure working environment. It helps protect the confidentiality, integrity and availability of the information and systems accessed and are important for effective risk management.

High incident reporting is an indication of a transparent culture across the organisation which helps increase the level of awareness of issues regarding safety, quality, environment, and security. This also helps to create a culture of improvement as unsafe situations are easily addressed, corrected, and improved.

During 2022 we had zero recorded Patient Safety incidents.

3.2 Patient Experience

3.2.1 Patient Reported Experience Measure (PREMs)

Patient experience is at the heart of all we do at HBSUK. We strive to ensure that all patients who engage with us are given the best possible experience. We build specific patient experience measuring tools into our Virtual Lucy® platform to ensure that we collect as much information as possible at the time of delivering our services.

For completed PREMs during 2022 we maintained our high standards and achieved:

- A score of 4.64 out of 5 for First Appointments
- A score of 4.69 (out of 5) for Follow-Up Appointments

We have high PREMs completion rates, and these are as follows:

- We observed that 54% of PREMs are completed for First Appointments
- We observed that 33% of PREMs are completed for Follow-Up Appointments

Regarding overall experience, we recorded **over 95%** of patients being satisfied with the overall experience.

3.2.2 Complaints

We take complaints about our service seriously and always act upon any complaint received.

- Complaints were recorded by patients in less than 0.16% of appointments delivered through Virtual Lucy®
- Over 97% of complaints were resolved within our 3-day Service Level Agreement

3.2.3 Compliments

We are very pleased to receive compliments from our patients and during 2022 we received several patient and clinicians regarding their experience of working with HBSUK and our Virtual Lucy® platform.

- There were 20 formally received compliments from patients in 2022.
- There were 4 formally received compliments from clinicians in 2022.
- There were 2 formally received compliments from clients/physio providers in 2022.

Examples of compliments received:

Patient 1

"Hi,

I have had to cancel my final appointment with M.S. (was scheduled for tomorrow at 10:40am) as I am down with Covid and all my pains from the bike accident have completely cleared up and am now racing on my bike again! Friday was due to be our final follow up.

Wasn't sure how best to reach out but I wanted to get a message to M.S., that she did a fantastic job of walking me through the process and getting me fit again in such a short time – I really appreciated her calm approach and patience with me! Brilliant work. I would be grateful if you could find some way of passing my thanks on to her?"

Patient 2

"Hi Virtual Lucy Support,

Not sure of the correct place to send this email but maybe you could forward where relevant.

I have just been discharged from my Physio course for a troublesome back and would like to say I could not have asked for a better Physiotherapist than clinician H.

Very knowledgeable, very caring and interested in my wellbeing and informative about my future self-care.

Although I was a bit doubtful whether online Physio would be beneficial, together with the easy-to-follow app exercises I am very pleased with the results. Thanks again."

Clinician 1

"Following our chat, I said I will drop you an email to convey to you the incredibly responsive and supportive administrative support team at Virtual Lucy. Everyone I have spoken to (usually late evenings during my clinic) have been very helpful in sorting out things for me. I was especially impressed with their quick response time for additional information or when things needed to be sorted out."

3.3 Clinical Effectiveness

In measuring the clinical effectiveness of Virtual Lucy® we saw in MSK that there was less than 10% escalation of patients from Advanced Physiotherapist to consultant either before or after investigation.

We also observed very low re-referral rates for patients returning to the service. In MSK we have less than 3% of patients coming back to ask for more physiotherapy. This clearly indicates that using Virtual Lucy®:

- We select the correct patients to be treated with physiotherapy.
- Our physio providers perform very well through the digital pathway.

Similarly, in our Gastroenterology pilot we observed that 88% of confirmed diagnoses were correct after the initial Virtual Lucy® questionnaire stage. Of the patients in the pilot 29% could have been discharged directly with advice without any face-to-face appointment and 45% could have gone direct to endoscopy.

Also 41% of patients could have had a digital appointment in Virtual Lucy® and been reassured or have management plan from just the video assessment. Engagement of patients on the platform prior to face-to-face appointments halved the time taken to complete the consultation and improved the quality of the interaction with the clinician. By reducing the need for face-to-face appointments by up to 50% and reducing the time required for each there is a potential fourfold increase in outpatient productivity.

We feel this evidence is overwhelming and makes the case for widespread adoption of digital clinical pathways alongside face-to-face appointments to provide a significantly more effective and cost-efficient service able to deal with a far higher capacity.

3.4 Staffing

HBSUK promotes an open and supportive culture where staff are encouraged to share any concerns over quality of care or the services we provide without fear of repercussions. We are a diverse and inclusive organisation which brings many advantages:

- **Increased creativity and innovation:** A diverse and inclusive organization has employees with different backgrounds, experiences, and perspectives, which can lead to increased creativity and innovation. When individuals from diverse backgrounds work together, they can bring unique ideas and solutions to the table.
- **Improved decision-making:** A diverse and inclusive organization can also benefit from better decision-making. When people with different perspectives and experiences work together, they are more likely to consider a variety of factors and viewpoints before deciding. This can lead to better decisions that consider a broader range of perspectives and potential outcomes.
- **Better employee morale and retention:** A diverse and inclusive organization has a positive work environment where all employees feel valued and respected. This can lead to better employee morale and job satisfaction, which results in higher employee retention rates. Employees who feel valued and included are more likely to stay with an organization for the long term.
- **Improved customer satisfaction:** A diverse and inclusive organization is better able to understand and serve a diverse customer base. When employees come from a variety of backgrounds and experiences, they are better equipped to relate to and understand the needs of a diverse customer base. This leads to better customer service and increased customer satisfaction.

Enhancing Patient Safety

We actively promote the reporting of security incidents, breaches or suspected incidents and breaches. Reporting of information security incidents helps maintain a safe and secure working environment. It helps protect the confidentiality, integrity and availability of the information and systems accessed and are important for effective risk management.

High incident reporting is an indication of a transparent culture across the organisation which helps increase the level of awareness of issues regarding safety, quality, environment, and security. This also helps to create a culture of improvement as unsafe situations are easily addressed, corrected and improved.

Incident Reporting Process

HBSUK IT Security Incident Reporting policy requires that details of all incidents resulting in breaches of security (or near misses), whether by staff or others and whether deliberate or accidental, must be reported as soon as possible.

All security incidents are brought to the attention of the company CTO and CEO within 24 hours of the incident being identified. The incident report form is provided to the CEO as soon as it is completed and in the worst case, within 72 hours of date of arising.

All IT security incidents of whatever nature are reported in the monthly Senior Management Team meetings. The Directors consider any preventive action necessary and capture specific actions. The Directors also authorise resources and funding as deemed appropriate.

Data breaches

HBSUK have no data breaches reported during the year 2022.

HBSUK Incident Reporting Culture

As stated previously, we at HBSUK actively promote the reporting of incidents, breaches or suspected incidents and breaches. Our aim is to improve safety and quality within the organisation by creating a safe incident reporting culture that ensures:

- an atmosphere of **openness** in which staff can confidently report incidents without fear of blame.
- staff recognise incident reporting as a **learning** opportunity which can help to **improve** patient safety.
- **feedback** of investigation and outcomes are notified to the person who reported the incident and any other relevant internal or external stakeholder.

3.5 Positive employee experience

3.5.1 Employees

People are the most important asset of the business and continuous development is an important and recognised need for individuals and the business to flourish.

Staff Wellbeing

Staff wellbeing is a priority at HBSUK as we recognise the impact of a positive and inclusive environment on employees' life. Its importance has especially increased in these challenging times. Following are the actions taken by HBSUK to improve workplace wellbeing:

- flexible working hours are offered and can be agreed with the line manager. This helps promote a more positive work/life balance.
- job roles and responsibilities are clearly defined and communicated. This help employees in understanding what is expected from them and other staff members.
- periodic reminders are in place to confirm policy's existence and the latest version of the policy is kept for reference on our Intranet.
- training and development needs are identified and agreed with employee to develop their full potential. Training can be completed during working hours.
- important move towards real inclusivity in the workplace has been put in place by encouraging employees to their pronouns in their signatures. An inclusive environment helps people feel more valued and connected with the organisation.
- zero tolerance to any type of discrimination, harassment, and bullying. Any individual found to be subjecting another employee to any prohibited conduct, will be dealt with under the disciplinary procedure.
- birthday day is granted as an additional holiday as we believe no one should be working on their birthday.

Staff Day

We believe that having annual Staff days are crucial for team building and improving staff morale. This has become even more vital in the last two years as people started working from home which decreased human interaction.

At HBSUK we annually hold Staff days to improve staff engagement and create a positive environment through listening and communication activities and some fun games. The most recent one was held in September 2022. The day included some updates on the business from various teams, feedback activities from employees, networking, and other activities. This was well received by staff as it helped create a positive environment, improve confidence and communication between teams. All the feedback received from staff was collected and discussed at Board level.

3.5.2 Clinical Employees

Regular communication with clinicians through newsletters

Newsletters are circulated to all clinicians onboarded and actively working on Virtual Lucy® at 2-3 monthly intervals. Content includes topics such as “meet the team” an introduction to new team members, both clinical and non-clinical that the clinicians may interact with.

Data insights are included to highlight trends picked up on data analysis of interest to the clinical team and to influence behaviours, such as positive re-enforcement for use of virtual physiotherapy.

The newsletters are also used to communicate any changes to clinical pathways, functional use of the system and updates on new software release or training material.

Channels to feedback to HBSUK are also re-enforced. The newsletters aim to improve engagement with the remote team.

Clinician training

Training materials are held on HBSUK SharePoint Teams Collaboration Portal. Access is granted following onboarding. These include a series of training videos and a quiz on functional use of the software and associated services and clinical pathway infographics.

Training videos are updated as new software features are released. Links to any new training videos and written guides are embedded in either the newsletter or in email format. Clinicians can request test patients via the portal on our test site, this is to enable them to practice navigating the system prior to conducting live clinics. 1:1 training via Teams is occasionally arranged on individual clinician request.

In addition, monthly informal drop-in sessions, led by HBSUK AP Clinical Leads, have been introduced for all VL clinicians and can include case discussions and questions on system and process.

Involvement in software development

Clinician input forms an integral part of our software development. Within the Virtual Lucy® platform all clinicians are trained and encouraged to use the support page to suggest improvements, enhancements and raise any concerns.

With each release cycle new features are tested extensively by the HBSUK clinical team and fed back to the technical team.

Ad hoc workshops are scheduled between the Clinical team and Director of Product and Service to resolve clinical implications and design changes.

Tool for peer-to-peer data insight

A data insights page has been created which enables each clinician to view outcomes and patient experience data against their anonymised peer group. This aims to encourage engagement with the wider remote clinical team and re-enforce positive behaviours in line with evidence based clinical pathways.

4 PART 4 – Statements of Assurance from The Executive Team

4.1 ISO9001 and ISO27001 Standards External Audits

During the reporting period 2022, one ISO9001 and ISO27001 external audit was conducted. The report of the audit was reviewed by HBSUK, and we intend to take the following actions to improve the quality of services provided and contribute to our continuous cycle of quality improvement:

- Review documented process for non-IT supplier evaluation.
- Review the training log for all employees.

4.2 Data Security and Protection Toolkit (DSPT)

For 2021/22, HBSUK completed the Data Security and Protection Toolkit submission and are compliant with the National Data Guardian's Data Security Standards, exceeding statutory obligations on data protection and data security.

Through 2023, we continue our commitment to maintain both an effective ISO 27001 management system and our quarterly meetings that focus on ensuring the quality, integrity, and security of our data.

4.3 Whistleblowing

Our whistleblowing policy is available to all staff through the Company Intranet. The aim is to encourage employees to come forward with any concerns. The policy is designed to deal with concerns raised in relation to the specific issues which are in the public interest, and which fall outside the scope of other HBSUK policies and procedures.

4.4 Safeguarding

Safeguarding is a key governance priority for HBSUK. The Company aims to ensure provision of safe and effective care and to promote the well-being and welfare of patients. The commitment to safeguarding is demonstrated through safe recruitment, appointment of Safeguarding Officer, awareness of harm and abuse within Company, promptly reporting, and communication of policy to staff and patients.

The Company's appointed Safeguarding Officer is Mark Emerton supported by Mark Fountain as Deputy Safeguarding Officer.

4.5 GDPR and Cyber Security Training

Training and development of staff represents an important aspect of the business. Both GDPR and Cyber Security play a huge role in the day to day working practices and it has become critical that staff have the knowledge and understanding to obtain, store and protect patient data, so that they adhere to the regulations.

In 2022 all HBSUK employees completed the GDPR and Cyber Security training.

4.6 Data Quality

HBSUK's Management Information team ensures quality, completeness, and integrity of our data. Good quality data can help enhance patient safety, ensure effective patient care, identify relevant trends and patterns, improve patient outcomes, and facilitate better decision-making.

HBSUK have in place a series of policies and procedures that ensure all reports are produced consistently and contain the relevant data.

4.7 DFOCVC

The Digital First Online Consultation and Video Consultation Framework (DFOCVC) provides a streamlined route for the supply and purchase of online consultation and video consultation systems. HBSUK are registered on this framework and able to offer services to our clients using this method of sale where all suppliers who have been assured onto the framework have a guaranteed level of capability and are proven in this area.

4.8 IR35

IR35 is a tax legislation in the United Kingdom that was introduced in 2000 to prevent tax avoidance by individuals who provide services to clients through an intermediary, such as a limited company, but who would be considered an employee if they were contracted directly by the client. The legislation is also known as the "off-payroll working rules."

IR35 is designed to ensure that individuals who work in a manner like an employee, but who operate through their own limited company, pay the same amount of tax and National Insurance contributions as a regular employee would. The rules apply to contractors, freelancers, and consultants who provide services to clients through an intermediary, such as a personal service company (PSC).

If a contractor falls within the scope of IR35, they will be required to pay income tax and National Insurance contributions as if they were employed directly by the client. The client is also responsible for deducting and paying employer's National Insurance contributions.

HBSUK has a strict policy around the use of IR35 and clear internal guidelines set by the Executive Team when this is applicable and when it cannot be used. All new hires who are not permanent staff members are assessed using the HMRC tools governing IR35 to ensure that HBSUK does not incorrectly interpret these rules and place with either HBSUK or any client at risk of falling outside of these boundaries.