Generic Contact Assist Information
for CCG/IG/PIA Assessments and Approvals

1	**Name of Product/System**	Contact Assist
1.1	Supplier	Oak Innovation Ltd
1.2	Supplier Lead Contact	Rob Constable
1.3	Contact Details	Rob.constable@oakinnovate.com 01202 607 000
1.4	Description of product	Contact Assist is a middleware solution integrates with the uses the clinical system and the phone system. It provides screen popping, SMS messaging, call logs, call dialling and new number capturing.
1.5	Features	The system provides screen popping, SMS messaging, call logs, call dialling and new number capturing.
1.6	Overall Benefits	Improves the performance and time it takes to locate a patient in the clinical system through its screen popping functionality. It also gives the function of SMS messages through premade message templates. E.G. if the patient fails to answer the call from a doctor.
1.7	Other Parties involved	GP Practice, Telephony Supplier to practice, IT Support

2	**Information/ Data**	Contact Assist uses non-sensitive Patient Demographics data, as a subset of consented information already held in the GP Principle Software.
2.1	What data is being shared	Non-sensitive Patient Demographics; Name, Sex, Address, DOB, Telephone Numbers, NHS Number, Regular/Usual registered GP and email address
2.2	Purpose/Use	To match known telephone numbers to patient demographics.

2,3	How Collected	Electronically. Depending on the clinical system varies on how the data is collected.
		EMIS integration requires a username, password, organisational ID for us to connect. In addition, the contact assist API must be enabled within EMIS with the created user given the permissions to use it. The data is then synced once per day by the system.
		Systm1 uses a report generated from the system that is exported to a CSV file in a specific folder on a regular basis. Contact Assist then reads that file and updates the records again on a daily basis.
2.4	Where stored	No Patient sourced data is handled or processed off-site – All demographics remain within the GP Practice on an assigned Practice PC (referred to as the Contact Assist Connect Server PC) behind all the normal protections.
		The data is stored in a secure SQL database.
2.5	Who and how will the information be assessed by and what controls are there	Contact assist client software is only installed on GP Practice PC's and therefore access is controlled by whatever control methods the Practice employs.
2.6	Who is Responsible/Data Controller	The GP Practice - normally Practice Manager or responsible IT person
2.7	New Data Collected	Data is primarily collected from the clinical system although if a new number is recognised when calling in Contact Assist will bring up a pop up that will ask the user whether they want to capture the data. If they choose to do so the user will be taken to their clinical system to add in the patient or update the record.
2.8	Data Flow	See network typology below
2.9	Ability to print data held as part of GDPR	It is possible to view all held data on a single display and a screenshot could be taken.
2.10	What Reports are produced based on this data	On-screen telephone logs/call histories show both the telephone number and name of the caller.

3	**Monitoring Of Telephone System**	Contact Assist works with a wide range of telephones systems such as Avaya, Mitel, LG, Panasonic and many others. It can also integrate with hosted telephone systems such as Gamma Horizon.
3.1	Device Firewall	If the phone system needs to be connected to the practices network some phone systems, such as the IP office has a separate LAN port of the phone system for multiple networks. It also has an interface firewall to secure the traffic. It may also be prudent for any connection of the phone system onto the GPs network to place another firewall between the two for further security. Should access rules or port allowances need be put in place ports and IP addresses can be provided.
3.2	Remote Tapi Monitoring	Some phone systems allow monitoring via the WAN should putting the PBX on the network be a problem. Ports would still need to be opened on the firewall to allow this and the telephone maintainer would need to provide the WAN IP.
3.3	Hosted Telephony	Hosted telephone systems allow us to monitor the CTI traffic from the users PC, thus no need for CTI licenses or any changes need be made with the telephone system.
3.4	Alternatives	Some practices deem their own internal firewall and security in place before Contact Assist deployment is sufficient, thus no changes are made.
3.5	Parties involved	NHS IT, Telephone System Provider

4	**Approvals & IG Compliance**	
4.1	Organisations Discussions and/or Approval has taken place	
4.2	GP Principle Software Approval	Contact Connect is a full accredited **EMIS** Partner Solution. Our product can be found on their website: https://www.emishealth.com/products/partner-products/contactassist/

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		We have API agreements with TTP **S1** and are the only Telephone Integration provider TPP work with.
4.3	GPSOC/ISO 27001/IG Toolkit	
4.4	Remote Access	Oak Innovation Ltd uses LogMeIn rescue as its primary tool for remote access. Where this is not possible, we are happy to use other remote programs such as Bomgar or AnyDesk. Should IT have its own remote access Tool, Oak is happy to facilitate.
4.5	General IT Security	Oak does not keep permanent remote access to any site and access can only be granted through the permission of IT.

5	**IT Assistance Required**	
5.1	Administrator Rights	Oak requires a administrative login in order to install the software on the Contact Assist server and the client application on others machine.
5.2	Firewall	If the phone system does need connecting to the Practice Network then IT would have input involvement in this either supplying themselves or liaising with the phone system supplier.

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Oak Contact Assist Schematic and Data Flows

Ext 520

Outbound SMS

Monitoring & Call Control
Incoming & Outgoing Via CA
Server

ContactAssist client screen pop
identify caller
Screen Pop Clinical System
New Number Capture
Highlighted Alerts

CLI number of patient on
an incoming call provided
by phone system

ContactAssist Client PC

CTI/TAPI ports open

Manual Interaction by
Staff For New
Number Capture and
Dealing with Alerts

Telephone System

GP LAN Network

Reports to enable
dashboard alerts

EmisWeb
Clinical
System

On Prem PC/Server
ContactAssist Server App
PBX TAPI/CTI
ContactAssist Address Book

Partner API integration
provides patient
demographic data

ideas that change everything