



PWYLLGOR DIGIDOL, DATA AC ARLOESI
DIGITAL, DATA AND INNOVATION COMMITTEE

DYDDIAD Y CYFARFOD: DATE OF MEETING:	21 July 2026
TEITL YR ADRODDIAD: TITLE OF REPORT:	EDRMS (Document Management System) re-procurement
CYFARWYDDWR ARWEINIOL: LEAD DIRECTOR:	Huw Thomas, Executive Director of Finance
SWYDDOG ADRODD: REPORTING OFFICER:	Anthony Tracey, Director of Digital, Data and Technology Carolyn Williams, Head of Digital Transformation & Programmes

Pwrpas yr Adroddiad (dewiswch fel yn addas)

Purpose of the Report (select as appropriate)

Ar Gyfer Penderfyniad/For Decision

ADRODDIAD SCAA
SBAR REPORT

Sefyllfa / Situation

The purpose of this report is to provide the Committee with an update on the procurement of the Electronic Document and Records Management System (EDRMS). This update outlines the procurement process undertaken and the outcome of this exercise, ensuring the Digital, Data and Innovation Committee (DDIC) has clear oversight of the forthcoming contract award and the associated financials.

The Committee is asked to note the progress to date, endorse the procurement outcome and support the continuation of the programme to ensure a seamless transition to the new contract with no disruption to service.

Cefndir / Background

The Health Board is progressing the procurement of an EDRMS as a key enabler of its wider digital transformation programme. This programme aims to transition from paper-based records to a digital, integrated health record, addressing current challenges including the management of approximately 1.5 million paper records, delays in accessing information across multiple sites, and inefficiencies associated with physical record storage and retrieval.

The implementation of a modern EDRMS is critical to ensuring that clinical information is available at the point of care, improving patient safety, supporting timely decision-making, and enabling more efficient and coordinated services across the Health Board.

The initiative aligns with both local and national strategic priorities, including the Health Board's Digital Response and long-term strategy, A Healthier Mid and West Wales (AHMWW), as well as wider NHS Wales ambitions to achieve digital maturity and integrated care.

The move to a paper-light organisation will support improved patient outcomes, enhanced clinician access to records anytime and anywhere, and greater operational efficiency, while

also ensuring compliance with information governance, data protection, and regulatory requirements.

The Health Board is currently operating with an EDRMS provided by Civica (Cito), which supports the storage of digitised patient records following the completion of the large-scale back-scanning programme in January 2026. However, the transition to a fully embedded digital records model remains incomplete, as “day forward” scanning (the process of digitising new records at the point of creation) has not yet commenced, creating a risk of reverting to hybrid paper/digital processes and limiting the full realisation of benefits. With the existing contract due to expire in March 2027, a managed procurement and transition to a new solution is required, including the safe migration of over 435,000 digitised records and the establishment of a sustainable long-term platform.

There are several organisational risks associated with the current position. These include:

- the risk of service disruption if transition timelines are not achieved
- ongoing reliance on paper processes impacting clinical efficiency
- challenges in ensuring consistent access to patient information across multiple sites

There is also a risk to patient safety and quality of care if information is not readily available at the point of need, alongside operational inefficiencies linked to manual record handling and storage.

The EDRMS programme is expected to deliver measurable improvements, including increased accessibility of records (24/7 access across sites), reduction in paper handling and storage costs, and improved clinician productivity through faster retrieval of patient information.

The evidence base to inform decision-making is drawn from the completed scanning programme, system testing, and national and local digital strategy alignment, all of which demonstrate that progressing to a fully integrated, paper-light model is essential to achieving improved patient outcomes, operational efficiency, and long-term sustainability.

Re-procurement of the EDRMS commenced in January 2026 to ensure continuity beyond the current contractual term, avoid any break in service provision and compliance with record management requirements.

Timeline of key procurement activity:

- Invitation to Tender (ITT) published – April 2026
- Evaluation complete – May 2026
- Contract award – September 2026
- Transition period and new contract mobilisation ahead of April 2027

The current contract is due to expire on 31 March 2027, and the awarded supplier will be expected to commence implementation on 1 September 2026 with the view of completing successfully within seven months by 1 April 2027.

Procurement has now reached the award stage; however, the process remains subject to the mandatory standstill period which limits the disclosure of commercially sensitive information at this time.

This contract presents a key pillar to an integrated Digital Health Record (DHR), with long term intentions towards accessibility for both clinicians and patients and is the foundation that all our other clinical solutions will be built upon. It will allow clinicians to share patient information from multiple locations to both support and expedite decision making and provide better quality care.

The key drivers for the EDRMS solution stem from the Health Boards' overall goals and objectives:

- Better Patient Care - Digital records will provide a complete picture for patient records enabling faster diagnoses, prevent the duplication of tests or entering information and provide an important contribution to enable integrated care,
- Access Anytime/Anywhere - The provision of simultaneous 24/7 access to clinicians, to patient health records, irrespective of location across Health Board premises by removing the human element of document management,
- Patient Safety - Digital records will provide complete, up-to-date patient information so that clinicians' decisions are fully informed to ensure the highest quality care is provided,
- Operational Effectiveness – Benefits which will help the Health Board to operate more efficiently, saving time on bureaucratic processes,
- Reduction in operational costs associated with the storage and retrieval of paper records.

Asesiad / Assessment

The procurement of the EDRMS has been undertaken in accordance with established NHS Wales procurement processes, working in partnership with NHS Wales Shared Services Partnership (NWSSP) procurement.

The tender has been delivered through a structured governance process, including the development of a comprehensive specification, aligned evaluation criteria and formal tender publication. Procurement timelines and approvals have been planned in line with organisational and national requirements.

A multidisciplinary evaluation approach has been applied, with input from digital, information governance and operational stakeholders to ensure that both technical and service requirements are fully reflected. Evaluation activities included the review of supplier submissions, structured scoring against defined criteria and demonstration assessments, all of which ensured a robust and transparent selection process.

- The London Procurement Partnership (LPP) Framework for Digital Document Solutions under Lot 6 EDRMS was utilised for this requirement.
- Up to 14 pre-qualified suppliers were invited to participate and following evaluation of the written submissions, the highest scoring suppliers were shortlisted, with the top three progressing to the demonstration stage.
- Evaluation was undertaken using a robust, predefined scoring methodology, incorporating assessment of technical compliance, quality, and commercial response. This included detailed review of supplier proposals against the Health Board's specification, demonstration assessments, and input from a multidisciplinary panel including digital, information governance and operational stakeholders.

The procurement process has been designed to ensure fairness, transparency and compliance with relevant procurement regulations. Key milestones, including tender publication, evaluation and contract award are subject to organisational governance and scrutiny.

Argymhelliad / Recommendation

The Committee is asked to:

- **ENDORSE** the proposed procurement approach.

- **SUPPORT** the continuation of the programme to ensure a safe and seamless transition to the new contract, with no disruption to clinical and operational services.
- **NOTE** the progress of the EDRMS procurement exercise and the outcome of the tender process.

Amcanion: (rhaid cwblhau) Objectives: (must be completed)	
Cyfeirnod Cylch Gorchwyl y Pwyllgor: Committee ToR Reference:	2.1.2 That the organisation is discharging its responsibilities with regard to the quality and integrity; safety, security and appropriate access and use of information and data, to support health improvement and the provision of high-quality healthcare.
Cyfeirnod Cofrestr Risg Datix, Teitl a Sgôr Risg Cyfredol: Datix Risk Register Reference and Score:	Not applicable
Parthau Ansawdd: Domains of Quality Quality and Engagement Act (sharepoint.com)	7. All apply
Galluogwyr Ansawdd: Enablers of Quality: Quality and Engagement Act (sharepoint.com)	6. All Apply
Amcanion Strategol y BIP: UHB Strategic objectives:	All Strategic Objectives are applicable
Nodau Cynllunio 2026/27 Planning Goals 2026/27	5. People First, Digital Always 7. Future Orientated 8. Fit for Purpose, Modern Facilities and Services
Hypergyswllt i Amcanion Llesiant HDdUHB 2026 Hyperlink to HDdUHB Well-being Objectives 2026	1. Deliver plans that increase our contribution to a sustainable, low carbon future 2. Strengthen resilience by planning for and adapting to climate change
Model Cymdeithasol ar gyfer Iechyd a Llesiant : (wedi'i gwblhau ar gyfer newid strategol a/neu newidiadau sylweddol i wasanaethau) A Social Model for Health and Wellbeing : (complete for strategic change and/or significant service changes)	7. All Apply

Gwybodaeth Ychwanegol: Further Information:	
Ar sail tystiolaeth: Evidence Base:	Not applicable

Rhestr Termiau: Glossary of Terms:	Contained within the body of the report
Partïon / Pwyllgorau â ymgynhorwyd ymlaen llaw y Pwyllgor Digidol, Data ac Arloesi Parties / Committees consulted prior to Digital, Data and Innovation Committee:	Non-Pay Group 17 June 2026

Effaith: (rhaid cwblhau) Impact: (must be completed)	
Ariannol / Gwerth am Arian: Financial / Service:	The procurement process has identified a preferred supplier that represents best value for money, having achieved the highest overall score across quality and commercial evaluation criteria. The transition from paper-based records to a digital EDRMS is expected to reduce costs associated with storage, retrieval, and manual handling, while improving operational efficiency across services. The procurement ensures continuity beyond the current contract expiry and supports a sustainable, long-term digital solution. Full financial details remain subject to the procurement standstill period and will be confirmed following contract award.
Ansawdd / Gofal Claf: Quality / Patient Care:	The implementation of an EDRMS will improve the quality of care by ensuring timely access to accurate and complete patient records at the point of care. This will support more informed clinical decision-making, reduce delays associated with physical record retrieval, and minimise the risk of missing or incomplete information. The system also strengthens governance through audit trails and secure access controls, supporting safer and more reliable management of patient information.
Gweithlu: Workforce:	The move to a digital document management system will reduce the administrative burden associated with paper records, including storage, transportation, and manual retrieval. This will release staff time, enabling a greater focus on direct patient care and value-added activities. The procurement includes requirements for supplier-led training and support to ensure staff are equipped to adopt and utilise the system effectively.
Tegwch lechyd: Health Equity:	The EDRMS supports equitable access to patient information by ensuring records are available digitally across all sites, reducing variation in access between locations. This will support more consistent care delivery regardless of geography and contribute to reducing inequalities in access to timely information within a largely rural health board population.

Risg: Risk:	The procurement process mitigates risks associated with the expiry of the current EDRMS contract by establishing a clear timeline for contract award and transition. A structured and compliant procurement approach has ensured a fair and transparent selection process. Residual risks relate to system implementation and transition, which will be managed through detailed mobilisation planning to ensure continuity of service and minimise disruption.
Cyfreithiol: Legal:	The procurement has been undertaken in accordance with Public Contracts Regulations and NHS Wales procurement processes, in partnership with NWSSP Procurement. The use of an established framework and structured evaluation approach ensures compliance with legal and regulatory requirements, including transparency, fairness and equal treatment of suppliers.
Enw Da: Reputational:	Delivering a compliant and transparent procurement process strengthens organisational reputation and demonstrates effective governance. The successful implementation of an EDRMS will support the Health Board's digital transformation ambitions and improve service delivery, reinforcing public and stakeholder confidence in the organisation's ability to modernise and manage patient information effectively.
Gyfrinachedd: Privacy:	The EDRMS solution includes robust information governance controls, including secure access, audit trails, and compliance with data protection requirements. This supports the safe and appropriate handling of patient data, ensuring confidentiality, integrity and traceability of electronic records throughout their lifecycle.
Cydraddoldeb: Equality:	The move to a digital EDRMS supports equality by improving consistency in access to patient information across services and locations. This ensures that all patients benefit from timely and coordinated care, regardless of where they receive treatment. The system also supports compliance with organisational and statutory equality duties through improved standardisation of processes and information access.