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| Clinical Authority to Release (CATR) for | X-on | Surgery Connect |
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| Directorate / Programme | Transformation Directorate / Digital Clinical Informatics | Project | Clinical Safety |
| Document Reference | Surgery Connect-CATR-01 | | |
| Director | Dr Alec Price-Forbes | Status | Approved |
| Owner | Dr Sebastian Alexander | Version | 1.0 |
| Author | Rudi Hennessy | Version issue date | 20/10/2025 |

Product Details

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|--------------------------|------------------------|---------------------------|--------|
| Project Name | Advanced Telephony BPF | | |
| Manufacturer Name | X-on | | |
| Product Name | Surgery Connect | Product Version ID | V08.25 |
| Manufacturer CSO | Dr Imran Khan | | |

Approval Details

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|---|--|-------------------------|------------|
| Programme CSO (where applicable) | Matt Houghton, Lead Clinician for GPIT (Digital Primary Care) Phil Kozan, Clinical Advisor (Digital Primary Care) Richard Hatton, Clinical Lead (Digital Primary Care) | | |
| CATR Approval Date (CSG) | 17/10/2025 | | |
| CATR Reviewer | Charles Olowosuko | CATR Review Date | 17/10/2025 |

Assurance References

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| Safety Assurance Plan | N/A |
| Clinical Safety Case Report | [Surgery Connect-CATR-01] [Surgery Connect-HL-01] |

Overall Clinical Safety Assessment

The X-on Surgery Connect solution integrates with the practice's electronic health record. This enables the practice to call a patient directly using the verified contact details stored in the practice record, or to identify the record of an inbound caller from these details.

In addition to this the X-on Surgery Connect solution also provides a secure messaging system for patients to submit photographs which the practice can view and incorporate into the patient's record rather than requesting them to be sent via email or other such insecure method. The patient interface allows for appropriate confirmations and verification with the patient and the integration with the electronic health record also reduces risks associated with misfiling.

The X-on Surgery Connect solution also enables integration with video consulting, where the integration brings the same safety benefits as for the communication of photographs.

The X-on Surgery Connect product, alongside the Phonebar, encompasses the core cloud-based telephony product delivered for the NHS Advanced Better Purchasing Telephony Framework, encompassing features such as Personalised Call Routing (X-flow). This feature allows certain Caller Line Identifications (CLIs) to be prioritised into specific groups.

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Version 1.0 of this CATR reflects approval of Surgery Connect. 73 hazards were identified, 71 classified as a 2 or 1 low level risk, 2 hazards classified as a level 3 medium risk. Controls have been implemented where possible and clearly noted as transferred where applicable. Transferred mitigation to providers can be found in the hazard log [Surgery Connect -HL-1].

All testing passed with no outstanding defects.

This version of the product does not contain any Artificial Intelligence (AI). If the solution is uplifted to add AI, new capabilities or functionality, X-on must submit new safety documentation to CSG.

Any resellers of the X-on product, Surgery Connect, must notify NHSE if they change the product in any way. This includes any modification, integration or configuration beyond the baseline product. This may require separate assurance and approval by NHSE Clinical Safety Group.

Disclaimer

This CATR has been approved by NHS England Clinical Safety Group. The approval is limited to the product defined by the name **Surgery Connect**, the functionality and use case defined within the above referenced Clinical Safety Case Report for **Surgery Connect**.

Clinical Safety Caveats – Table of measures or conditions required to underpin approval

| Ref. | Description of Caveat | Nature of Clinical Impact (including any workarounds) | Date Raised at CSG | Closed Date and Justification |
|------|-----------------------|--|-----------------------|-------------------------------|
| 1. | | | | |
| 2. | | | | |

0 caveat recorded