QuantumColleagues.

THE COMPANION TO ADOPTING AI: FIRST STEPS FOR SMES

The AI Playbook

for Care Operators

Ten plays for taking the paperwork off your team, without a single resident record leaving your control.

WHO IT'S FOR	EDITION	FROM
Owners, directors and registered managers running more than one service	November 2026 · v1.1	QuantumColleagues

quantumcolleagues.org · Buy AI for your business. Fund post-AI training for everyone. ·

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01 · START HERE

The same method, in a **harder place**

Our first guide said one thing. Pick one painful job, keep a person in charge, measure the hours you get back, then pick the next job. That still holds. This playbook takes it into care, where the paperwork is heavier, the records are more sensitive and an inspector can walk in on any morning.

Each play has four parts. **The grind** is the job as it is done today. **The play** is what the AI colleague takes on. **Who signs** is the named person who approves anything that matters. **The record** is what the play leaves behind, because in care a job with no record did not happen.

THE ONE RULE

People decide. The AI fetches, drafts, collates and reminds. It decides nothing about a resident, a member of staff, a complaint or a pound.

02 · WHY CARE IS DIFFERENT

Four things make care harder than the average small business

YOU ARE INSPECTED ON YOUR RECORDS

Well-led is where operators with several services get caught, because Well-led is about governance, and governance is records. Regulation 17 asks you to show that you check, learn and keep accurate records. An AI that leaves a clear trail supports that conversation. One that works in the dark makes it worse.

YOUR RECORDS ARE THE MOST SENSITIVE KIND OF DATA

The law treats health records as special category data. A carer who pastes a care plan into a public chatbot to tidy the English has sent that data to a stranger, with no contract and no record. Your data lead will expect an impact assessment before any new system touches resident records.

YOU RUN 24 HOURS A DAY WITH A CHANGING TEAM

Nights, agency staff, new starters, and a manager covering a shift. Any play that needs a specialist to run it fails by week two. These plays are built for the people you already have, in the hours they already work.

ONE POLICY, SIX VERSIONS

Across six homes you have one policy and six versions of it in practice. Handover notes, incident forms and family letters drift from home to home. Part of this playbook is getting back to one.

03 · THE PROBLEM, AND THE LINE

It is already happening, and it is **not malice**

A deputy manager uses a chatbot on her phone to turn shift notes into a readable handover. An administrator pastes in a complaint letter to draft a reply. A new manager asks a public tool what the policy says about a medication error, because the folder holds two hundred documents and the shift starts in ten minutes.

Each of them was trying to do a good job faster. The business got three things it did not choose. Data outside its control. No record of what was asked. An answer nobody can trace to a source. A ban moves it onto personal phones. A free for all hands your records to tools you do not govern.

The fix comes in two steps. Today, put two rules in the handbook: no resident, family or staff data goes into a public tool, and a person checks anything before it goes out. When you are ready, give your people a colleague inside your own systems that answers the policy question with a page number, drafts the reply and keeps the record. People stop using the public tool when the safe one is quicker.

Draw the line before you start

One page, signed by the registered manager and the nominated individual. Everything the colleague does sits on one side of it or the other. The line is widened only by a person. The colleague cannot promote itself.

ABOVE THE LINE: THE COLLEAGUE ACTS, AND EVERY ACTION IS LOGGED

- ✓ Sorting the inbox
- ✓ Answering a policy question with the document and clause
- ✓ Chasing training that is about to lapse
- ✓ Gathering evidence by key question
- ✓ Drafting routine replies with no clinical content
- ✓ Producing the daily report

BELOW THE LINE: THE COLLEAGUE PREPARES, A NAMED PERSON APPROVES

- × Anything touching a care plan or a risk assessment
- × Anything about medication
- × Safeguarding, and deprivation of liberty
- × Statutory notifications
- × Complaint responses
- × Disciplinaries, grievances and references
- × Contracts and money
- × Any family message with clinical detail

NEVER

No clinical decisions. No medication advice. No deciding what is safeguarding. No deciding what to notify. Those stay human.

04 · THE TEN PLAYS

Ten plays that run today: **one to five**

PLAY 1 · THE POLICY QUESTION, ANSWERED WITH THE PAGE NUMBER

The grind. A senior carer needs the policy on a resident who refuses personal care. The right document is one of hundreds. She asks the manager, who is on the floor, or she guesses.

The play. She asks the colleague. It answers only from your own policies and quotes the document, the version and the clause. If the answer is not there, it says so.

Who signs. Nobody. It is a citation, not a decision.

The record. Every question and every answer, logged.

PLAY 2 · THE INBOX THAT SORTS ITSELF

The grind. Referrals, suppliers, families, agencies and circulars land in one inbox. The administrator spends the first hour sorting and the last hour catching up.

The play. The colleague reads the inbox through the day, sorts it, drafts the routine replies, and puts anything that matters in front of a named person with a one line summary.

Who signs. The manager, for anything below the line. Routine arrangements go out in the colleague's own name, and everyone who deals with it knows it is an AI.

The record. A timestamped log of what arrived, what was drafted, who approved it and when it went.

PLAY 3 · THE FIVE O'CLOCK REPORT

The grind. At the end of a long day the manager tries to remember whether everything was logged, chased and renewed. She finds out on inspection day.

The play. One report at the end of each day: what was logged, what is overdue, what expires this week, what is waiting for a signature.

Who signs. Nobody. It names the human owner of every open item.

The record. A dated record of oversight, which supports Regulation 17 in the plainest way we know.

PLAY 4 · THE TRAINING MATRIX THAT CHASES ITSELF

The grind. Refreshers expire quietly. The spreadsheet is right until the day it is not, and the gap shows up at inspection.

The play. The colleague reads the training record, flags everything inside your renewal window, drafts the reminder to the member of staff and the nudge to their manager, and reports the gaps daily until they close.

Who signs. The manager approves the reminders the first time, then they run.

The record. A live matrix with a trail showing every lapse was seen and chased.

PLAY 5 · DBS AND RIGHT TO WORK THAT NEVER LAPSE

The grind. Re-check dates live in three places and one person's head.

The play. The colleague tracks every date against your own policy, drafts the requests and follow ups, and lists anything due within sixty days. The check itself, and the judgement on it, stay with a person.

Who signs. The registered manager signs each completed check.

The record. A full vetting trail that supports Regulation 19.

04 · THE TEN PLAYS

Ten plays that run today: six to ten

PLAY 6 · THE INCIDENT WRITE UP

The grind. A fall at 02:40, written up at the end of a twelve hour shift in the wrong format, rewritten by the manager in the morning.

The play. The senior says what happened. The colleague structures it to your incident policy, fills the required fields and lists the follow ups your policy requires. Nothing clinical. No decisions.

Who signs. The registered manager reads, edits and signs. Whether to notify stays her call, and the colleague records what she decided.

The record. One format across every home, with a signed trail.

PLAY 7 · THE COMPLAINT ACKNOWLEDGED ON DAY ONE

The grind. A complaint arrives on Friday afternoon. It is acknowledged on Wednesday, and the clock on your own procedure has already run.

The play. The colleague recognises it, drafts the acknowledgement in your words and within your timescale, opens the file and attaches the policy clauses. The response is drafted later from the manager's findings.

Who signs. The registered manager. Nothing goes to a complainant without her.

The record. Every complaint, every stage, every date, in one place, which supports your complaints procedure and Regulation 16.

PLAY 8 · FAMILY UPDATES, WARM AND ON TIME

The grind. Families want to hear from you. The week runs away. The only contact is the invoice or the bad news.

The play. The colleague drafts the routine update from the notes staff already keep, in your tone, for a named person to send. Anything clinical waits for a nurse or manager.

Who signs. The keyworker or manager. The colleague never sends to a family on its own.

The record. Regular, approved contact, the Caring and Responsive evidence most providers hold only in memory.

PLAY 9 · THE APPLICANT WHO HEARS BACK THE SAME DAY

The grind. Applications sit for a week. The good candidate takes the job down the road.

The play. The colleague acknowledges each application the same day, checks it against the essential criteria you wrote, summarises it for the hiring manager and drafts the invitation. It decides nothing about anyone.

Who signs. The hiring manager chooses who to see.

The record. The same documented process for every applicant, which is what the Equality Act expects.

PLAY 10 · THE AUDIT PACK BEFORE THE INSPECTOR ARRIVES

The grind. Two days pulling evidence from six systems into a folder.

The play. Evidence is kept by key question as it is created. The pack for a service is assembled, with an index, in an hour.

Who signs. The manager reviews it. Nothing is added that is not already in your records.

The record. The pack and its index.

On the road map, not yet live. Supplier invoices matched and queued for approval, and contract renewals flagged ninety days out. We say so rather than sell them early.

05 · WHERE YOUR DATA GOES

In care this is not a preference, **it is the law**

APPLIANCE

On your own hardware

Admin Core runs on your own hardware. Your data never leaves your network.

MANAGED

In our private environment

Your data is processed in our private environment, hosted in the UK or EU.

EITHER WAY

Never a public AI service

The colleague reads only what the job needs, and every read is logged.

06 · MEASURING IT

Measure it before you start

Count these for a fortnight before and a fortnight after, so the comparison is honest. We will not quote you a percentage we have not measured in your own services. Anyone who does is selling you somebody else's number.

- Admin hours per service per week.
- Time from a family message arriving to a reply going out.
- Days between a training item expiring and its renewal.
- Policy questions answered with a citation, and how many at night or at the weekend.
- Days spent preparing for inspection.

07 · BUYING IT SAFELY

Ten questions to ask any vendor, including us

1. Where exactly does our data go? Show us, do not tell us.
2. Does any part of your system hold the send button, or does a person always approve what matters?
3. Does it cite its source for every answer, and what does it do when the answer is not in our documents?
4. Can the system widen its own autonomy, or only a named person?
5. What does the audit record look like? Could our inspector read it?
6. Do you hold Cyber Essentials, and for what scope? We hold it for the whole organisation.
7. Is your AI management system certified to ISO 42001, built using it, or neither? Ours is built using the framework and is not certified.
8. Will you help us write the data protection impact assessment?
9. If we leave, how do we get our data and records back, and how fast?
10. Who in our organisation is accountable, by name, for the system, its daily running, its technical state and its compliance review?

08 · YOUR FIRST THIRTY DAYS

One service, one play, **one line**

1 **Pick one service and one play**

The policy question or the inbox is where most operators start, because the gain is felt in week one.

2 **Draw the line**

One page, signed by the registered manager and the nominated individual.

3 **Name the four people**

System owner, operational lead, technical lead, compliance reviewer. Two may be the same person. Write it down anyway.

4 **Run in shadow**

The colleague drafts, a person sends, nothing goes out unseen.

5 **Measure, then go live**

Then widen the line one step and pick the next play. With Admin Core this is ten working days from signed order to live: consent, discover, configure, shadow, go live.

WHY WE SHARE THIS OPENLY

Businesses buy our AI, so nobody has to pay for the training

QuantumColleagues Ltd is half owned by Quantum Colleagues Training CIC, an asset locked community interest company. What care operators spend with us funds free post-AI training for young people and people in later life, and the free Career & Beyond careers app. That is why the method is in this playbook and not behind a sales call. The principles are free and you are welcome to them. The practice is the product.

If you want a hand, we run a two day AI Implementation and Governance Review for care providers. It tells you where your admin hours go, where your data is leaking, what your line should say, and what a safe first deployment would look like. You keep the report whether or not you buy anything else. Talk to us at **information@quantumcolleagues.org** or at **quantumcolleagues.org**.

QuantumColleagues Ltd, company no. 17219359. Quantum Colleagues Training Community Interest Company, company no. 17244034. Our AI management system is auditable by design and built using the ISO 42001 framework. We do not hold ISO 42001 certification. We hold Cyber Essentials for the whole organisation. Photos: Pexels.