

Adults and Health Select Committee
25 January 2018
Adult Social Care Online Portals



Purpose of report:

To update Members of the Adults and Health Select Committee on the Adult Social Care systems replacement project with regard to the implementation of online portals.

Introduction:

In September 2016, the Adult Social Care (ASC) Directorate's main IT systems were replaced with new software; LAS (the Liquidlogic Adults System for case management) and Controcc (a financial recording system). In addition, Surrey County Council (SCC) purchased a number of modules to enable the Council to automate some routine transactions and to provide a self-service style approach for those people wishing to access services online. The modules include:

- a provider portal to facilitate electronic invoicing for home based care providers;
- a citizen's portal to enable a Surrey resident to get an early indication of their likely eligibility for support from ASC and to find services and information for themselves;
- a client portal to enable people to submit self-assessments online directly to ASC and to access their care record;
- an online financial assessment tool to enable people to submit their financial information online and obtain an immediate calculation of the likely contribution towards any support.

This paper provides an update on the implementation of the portals and an overview of the approach which has been taken to date. The Adults and Health Select Committee is invited to input into the further development of the online tools.

Context:

1. The Council's current Corporate Strategy includes a key aim 'to make better use of digital technology to improve services for residents.' The launch of these online tools for residents' reflects this ambition by providing an early indication of eligibility alongside targeted information and advice. The online tools can be accessed outside of normal working hours and from any location, for example by family living outside of Surrey and on a range of devices, from laptops to smartphones.

Overview of the Portals and Implementation

The Provider Portal

2. ASC processes around 120,000 paper invoices per annum from home based care providers. The Provider Portal enables approved providers of home based care services to submit an electronic invoice to the Council. This is known as e-invoicing

and is a much more efficient way of processing invoices and in turn means that we can send timely and accurate invoices to those people required to contribute towards their home care package.

3. In July 2017 the Council piloted e-invoicing with Britannia Homecare, one of its larger home care providers. The first single electronic invoice was successfully processed and was equivalent to handling 205 paper invoices. Britannia Homecare has continued to submit e-invoices on a regular basis without any difficulty or delay.
4. Following the pilot, a further 11 providers have gone live and nine more providers are in the planning stages with a further 13 providers at the initial discussion stage. [There are some 140 regular providers of home care though some may have only a small number of contracts with ASC.] The new Home Based Care contract places an expectation on providers to submit invoices electronically and SCC will continue to work with providers to achieve a full roll out in 2018.

The Citizens' and Client Portals and Online Financial Assessment tool

5. In November 2017, SCC launched its 'online tools' for residents. The online tools are accessed via the Council's website and, in the first instance, provide the opportunity for adults and carers to complete a short checklist to give an initial indication of possible eligibility for support from Adult Social Care. The portals can be found at surreycc.gov.uk/adultsocialcareonline.
6. The checklist takes around ten minutes to complete. If, after completion of the checklist, the person wishes to complete a full assessment they are encouraged to do so by signing up for an account. The account will enable a person to submit a full Care Act compliant assessment to ASC. When completing the adult assessment, the person is informed at the outset that they will have to complete a financial assessment and may have to contribute to the cost of any support (this does not apply to carers.)
7. The completed assessment is transferred automatically into LAS, the Liquidlogic Adults case management system, saving time for ASC in keying data. This also means the information ASC holds reflects the person's circumstances in their own words. The assessment is briefly checked for completeness by the Adults Contact Centre Team and is passed to the relevant locality team for processing when complete. At this stage, there are no plans to provide services on the back of an online assessment, a visit by a social practitioner will still be required but the practitioner will be informed about the needs of the individual at the outset.
8. If, after completion of the short checklist stage, the outcome indicates that the person is not eligible for support from ASC, the tools are designed to signpost the person to tailored information to meet their needs. This information will help those who wish to source their own support in advance of any decision by ASC and will also help those who wish to self-fund their care and support.
9. An important part of the assessment process is the financial assessment. At any stage the adult or their family/financial advocate can complete a financial assessment on behalf of the individual to calculate the level of any contribution. Once completed online, the financial assessment can be sent directly to ASC by signing up for an account. All financial assessments will be verified for accuracy before being accepted as complete.

10. In the two months since the system went live, ASC has received 16 fully completed adult assessments, four carer assessments and 17 financial assessments. However, there have been 1,017 portal sessions logged and 808 new users. The difference between fully completed assessments and the number of sessions is significant but not an indication of an issue with the tools. We are currently analysing the point at which people leave the assessment process to determine the reasons behind the difference in total usage levels versus completed assessments. If the analysis shows that people do not go on to complete a full assessment because their needs are low level and do not meet the Care Act eligibility criteria, this is a positive outcome. The aim of the online tools is to help us manage demand at the front door by moving some of the initial assessment traffic online as well as signposting people to other sources of support at the earliest opportunity.
11. The usage levels to date reflect a soft launch of the portals whereby they have been made available on the Council's website without any significant publicity. Working with colleagues in the Council's Communications Team, ASC will be promoting the online tools from early January 2018 to encourage people to use the tools as a first step to seeking help. The publicity campaign includes local radio adverts, posters on buses and bus stops, posters in GP surgeries, information in local GP surgeries and health centres. This campaign will be targeted at family members and carers who might be supporting an adult. People in urgent need of immediate support will still be encouraged to contact the Council by usual methods including the Adults Contact Centre and the MASH for safeguarding matters.
12. The next steps for the online tools will be to look at how ASC can use them to interact with people that it already supports in addition to new users. There is the potential to customise the tools to enable people to complete their reviews online and, by doing so, increase the number of annual reviews ASC are able to undertake. The Council can also push out information to people online such as copies of their assessment and copies of their support plan. The longer term aim is to provide a complete electronic care record.

Conclusions:

13. We have launched the provider portal to good effect and will continue to work with providers to roll out e-invoicing to all suitable providers in 2018. The online tools for residents are in the early stages of development but provide an opportunity to change the way ASC interacts with people and could transform how the Council undertakes assessments going forward. Further analysis of usage of the portals will inform how SCC approaches the next stage.

Recommendations:

It is recommended that the Adults and Health Select Committee receive a further update on the portal developments in the autumn.

Next steps:

14. To continue with the roll out of the Provider Portal to all providers of Home Based care under the current framework.

15. To develop the online tools for people in receipt of support from ASC, including online reviews and support planning.

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Sources/background papers: Cabinet Report 26 May 2015 – Provision of a new system for Adult Social Care.

Social Care Services Board 26 October 2016 – Adult Social Care’s System Replacement

Glossary of acronyms:

ASC – Adult Social Care

LAS – Liquidlogic Adults System

SCC – Surrey County Council