Adult Social care Scrutiny Commission

**Adult Social Care
Customer Portal 12 Month Update**

Lead member: Cllr Rory Palmer
Date: 29 June 2017
Lead director: Steven Forbes

City Mayor

1. Purpose

1.1 The Adult Social care (ASC) Customer Portal is designed to support the corporate channel shift and 24/7 access to services by enabling anyone who is able (*personally or with support from carers, friends or family*) to access online social care and related services.

1.2 The aim is to free up more costly ASC face to face and telephone support for those that are unable to access on line provision through channel shifting the majority to use the portal.

2. Summary

2.1 The ASC Customer Portal went live in April 2016. It enables new customers to:
- Establish if they are potentially eligible for ASC social care
- Access Information, Advice and Guidance (IAG), as well as an online directory of services
- Utilise an online financial assessment tool to establish the financial contribution customers may need to pay
- Submit an application for support from

2.2 Since going live, the portal journey has been simplified to improve its user-friendliness (improving the layout, the content and reducing the "number of clicks" required to navigate around the system). Updates were made following discussion with a Healthwatch focus group and from customer and staff feedback.

2.3 The portal has an average of 600 visitors a month. Most visitors finish their visit following accessing an Information, Advice and Guidance report page (providing bespoke support to help them meet their specified needs).

2.4 To support the corporate channel shift strategy the portal has undergone significant enhancements that have opened up a range of online self-serve activity and assessment /referral opportunities.

2.5 Currently the portal is available for new customers only and is integrating with the back office IT system. This reduces the amount of inputting that staff need to complete. Work is in progress to open up use of the portal to current ASC customers. The intention is for ASC staff to be able to upload documents that are currently printed and sent to customers via the post, such as support plans.

2.6 The portal was advertised during the first 6 months of going live to raise awareness within the City.

2.7   Since go live, improvements have been made to the statistical information that can be gained from the system. However, owing to a number of assumptions that still need to be made; the information provided should be viewed as a guide and not actual evidence. Owing to standards relating to tracking individuals we are not able to monitor all aspects of a customer journey at this time. We also don't know how many of these still go on to phone social care to discuss their needs.

2.8   Appendix 1 shows statistical information gathered since go-live with the caveat that during the first couple of months a number of the "users" would be council staff who were viewing or demonstrating the portal.

2.9   A major challenge in updating the portal is to ensure it is robustly tested. Customers will use a range of hardware and a range of internet providers.

3. Recommendations

3.1   To note the report content and progress made on enhancing the ASC Portal.
3.2   To provide feedback and suggestions for future improvements.

4. Supporting information

4.1   The portal has been successful in directing customers to self-help and enabling them to understand any financial contributions. Of the 600 visits to the portal each month, around 10-15 users will continue to an assessment. The majority cease their online journey once they have received details of what they can do to self-help and establish where they could source services and/or activities to support their health and wellbeing (i.e. they receive IAG and are able to access tools such as AskSara and the My Choice online directory of services).

4.2   The portal has been enhanced to incorporate a full online Carer Assessment. Traditionally these paper based assessments are sent to Carers to complete and return via the post. Enabling online assessments allows:
- Completed assessments to integrate directly into Liquidlogic removing the need for social care staff to input details
- Carers to complete an assessment without having to wait of a form to arrive in the post (and negates the need for a Carer to take time to post it back)
- Reductions in postage and printing costs
- A more expedient service delivery

4.3   A further recent enhancement, which also complements the channel shift strategy, is the ability for portal users to complete an Equipment and Adaptations (occupational therapy related) referral. This referral can negate the need for a home visit and a paper based form being completed and puts the detail directly into Liquidlogic for the occupational therapy team to act upon.

4.4   A new referral form for professional agencies to refer customers directly to the occupational therapy service has also been developed and went live in May 2017. This removes the need for a phone call or email referral and means that social care staff do not need to input details as they are taken directly from the referral form.

4.5 Work is also in progress to enable a wider range of professionals to refer customers via the portal (over and above the occupational therapy referrals). This will reduce the number of phone and email referrals and further support the corporate channel shift strategy as referral information will be populated directly into system reducing the amount of input work required by Social care staff.

4.6 Investigatory work has taken place to establish if the ASC Portal could be accessed directly via a single sign on process, but it has been deemed not possible at this point in time owing to technicalities with integrating the other systems. This will remain under review as technical advancements are made.

4.7 Work is in progress to make the ASC portal easier to locate / more accessible to the public by adding in a link from the Council's homepage.

4.8 The Portal is available 24/7 enabling access at times that suit anyone regardless of their personal circumstance. This is beneficial to a range of customers who may have disabilities, care responsibilities or work commitments that make contacting the council during "office hours" a non-desirable option for them.

4.9 It should be noted that with this move towards self-service IT systems, such as the portal, there are challenges and complexities in relation to robust testing of new releases and enhancements. This is due to the fact that it is not possible to guarantee which IT hardware or internet facilities will be used by the public to access the portal.

4.10 There are a range of ongoing enhancements that are being made to the portal. With future plans including using the portal to receive direct referrals from a range of professionals as well as utilising it as a means of sending correspondence to current customers, it is essential that marketing of the portal is ongoing and sustained. This will be achieved over the next 12 months via a range of activities, including:
- a series of sessions that will be planned with social care teams so that they are confident in promoting the portal to current customers
- promotional work with professional agencies who refer to social care who will also be able to direct people to the portal for self-service assessments and IAG
- a series of sessions with staff from other public facing council teams such as housing, libraries, neighbourhood centres, customer service teams, advising them of the enhancements to the portal and its new functionality
- working with groups, such as Healthwatch, to promote the portal and its new functionality

4. Details of Scrutiny

Initial report (6 month progress) was taken to scrutiny committee 12 December 2016

To be discussed at the scrutiny commission meeting on 29 June 2017

5. Financial, legal and other implications

5.1 Financial implications

No financial implications (Martin Judson, Head of Finance Adult Services/Education and Children Services)

5.2 Legal implications

The report is for noting therefore there are no legal implications arising. Emma Horton, Head of Law (Commercial, Property & Planning)

5.3 Climate Change and Carbon Reduction implications

No implications

5.4 Equalities Implications

Equality impact statement was complete as part of Phase 1 of the project and is due for review towards the end of this year.

5.5 Other Implications (You will need to have considered other implications in preparing this report. Please indicate which ones apply?)

6. Background information and other papers:

7. Summary of appendices:

Appendix 1: statistical information (portal usage)

8. Is this a private report (If so, please indicated the reasons and state why it is not in the public interest to be dealt with publicly)?

No

9.   Is this a "key decision"?

No

10. If a key decision please explain reason