



social care  
institute for excellence

# Digitising and streamlining assessments webinar series – Sharing Digital tools

## Social care showcase webinars

SCIE is running a series of webinars on behalf of the Department of Health and Social Care in 2023 and 2024. We're highlighting organisations across social care who are taking great strides in the quest for innovation, improvements and excellent outcomes.



20<sup>th</sup> March 2024



Department  
of Health &  
Social Care



social care  
institute for excellence



London Borough of

Redbridge



Partners in Care  
and Health

# Digitising and streamlining assessments webinar series – Sharing Digital tools

## Hosted by:

- Tabitha Jay, Director, Strategy and Reform, DHSC
- Ellie Haworth, Head of Partnerships and Practice Improvement, SCIE

## Guest speakers:

- Renu Purvis, Project Manager, Innovation Delivery Team, Kent Council
- Rick Perry, Programme Manager, Strategy, Transformation and Performance, Dorset Council
- Jaime Guercio, Digital and Change Business Partner, Transformation, Innovation and Digital, Dorset Council
- Corinne Barrett, Digital Programme Lead for Children's and Adult Services at Redbridge Council
- Trusha Patel, Digital Communications and Change, Redbridge Council

# Agenda

1. **Introduction** – 5 mins – Tabitha Jay
2. **Developing a financial calculator** (Kent) – 10 mins – Renu Purvis, Innovation Delivery team
3. **Sharing and adapting digital tools** (Dorset) – 10 mins – Rick Perry, Strategy, Transformation and Performance and Jaime Guercio, Transformation, Innovation and Digital
4. **Implementing tools, and managing the front door** (Redbridge) – 10 mins – Corinne Barrett, Digital Programme Lead and Trusha Patel, Digital Communications and Change
5. **Open discussion** – 25 mins – Ellie Haworth, SCIE



# **Introduction**

**Tabitha Jay, Director, Strategy and Reform**

# **Developing a Financial calculator**

**Renu Purvis, Project Manager, Innovation Delivery Team**

- Providing accessible information, advice, and guidance that is accessible 24/7 and timely, preventing people telling their stories more than once.
- Putting in place a clear and transparent, simple process for people to navigate through, ensuring that contact is meaningful.
- By listening and being able to deal with people's needs through a person-centred approach.
- Working in partnership with communities, voluntary sector and wider partners in Health to provide choice, control and access to resources.
- Keeping the person at the heart of everything we do and work with partners to enable people to remain independent.



# Focus on: Financial Calculator

Making a  
difference  
every day

## WHY

To give people an upfront indication of their client contribution towards eligible care and support.

To support our staff, partners and key stakeholders to have financial conversations at the start of their assessment and support planning.

## HOW

Used the Granuis Solution to build in house

## SOLUTION

Short term residential

Long term residential

Non-residential

## IMPLEMENTATION

Started October 2022

Go Live March 2023

## DATA

No integration and monitoring of traffic via Google Analytics

## CO-PRODUCTION

- Subject Area Expert – Client Financial Services
- Corporate Digital Team
- Experts by Experience
- Project Manager

## TESTING

Client Financial Services Team

Experts by Experience

Digital Group

## NARRATIVE

Clear narrative and disclaimers in place on the websites to ensure people who use this tool fully understand that it is an indicative figure only and a full Financial Assessment, following a Needs Assessment, where a person is eligible for care and support, the final contribution will be confirmed.

## ANNUAL REVIEWS

At the start of each financial year the calculator is updated with financial data/benefits



## COMMUNICATION AND ENGAGEMENT – Ongoing...

- Adult Social Care Newsletter
- Team Meetings
- Senior Management Meetings
- Digital Roadshows
- Care Summit – June 2023
- Social Media
- Registered Provider Network Newsletter
- Kent and Medway ICB Newsletter
- GP Practices training webinars
- District and Parish Councils
- Libraries
- Online Course linked to Induction Programme



[Estimate how much you may need to pay towards your care - Kent County Council](#)



# Financial Estimator

Mar 23 120	Apr 23 329	May 23 244	Jun 23 256
Jul 23 222	Aug 23 239	Sep 23 222	Oct 23 232
Nov 23 250	Dec 23 189	Jan 24 240	Feb 24 260



# **Sharing and adapting digital tools**

**Rick Perry, Programme Manager, Strategy, Transformation and Performance**

**Jaime Guercio, Digital and Change Business Partner, Transformation, Innovation and Digital**

# Why a financial calculator?

- Increasing demand into our front door
- Google Analytics showed 'finance' was popular search
- Significant % of calls finance related
- History of clients:
  - starting financial assessment
  - Realising financial implications
  - Pulling out of process
- Needed to give professionals tool when talking with clients
- Part of much wider transformation programme

# Collaboration with Kent



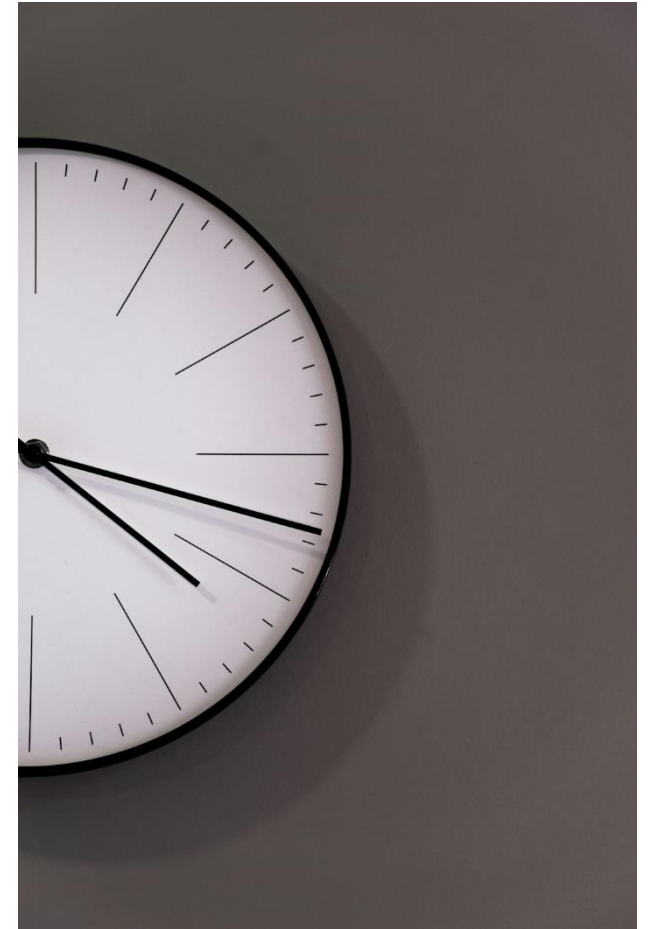
## **Our transformation, information technology and digital teams will:**

- Share knowledge about digital projects where there is an opportunity for potential reuse or collaboration with others
- Work together to create common solutions that allow us to check people's eligibility for services with central government and others in real time, with their consent



# What took you so long?

- Kent shared financial calculator
- Ambition to update:
  - All finance pages
  - new landing page for calculator
  - wording within calculator itself
- Resources (shared with rest of programme) included:
  - IAG Co-Ordinator
  - Content designer
  - Service designer
  - Engagement officer
- Challenges included:
  - Breadth of work
  - Some nervousness from different areas
  - Governance



## Where are you now?

- Financial ~~calculator~~ became 'estimator'
- All finance pages written
- User testing completed on estimator:
  - 5 users with lived experience
  - Various financial scenarios
  - Variety of feedback around the use of language & navigation
- Final tweaks being made
- Seeking approval from senior responsible officer for 'go live' April '24



## Strengths and Improvements

Strengths	Improvements
Tool was useful in giving a rough idea	The language needs to be simplified and combed for jargon
The form wasn't too time consuming	The next steps of the process need to be explained and signposted with the relevant literature and contacts
It's clear that the result is an estimate	Expand the input options to include a wider range of benefits and other financial details to give a more accurate picture
The form retained information and didn't clear details after pressing 'previous'	Include explanations as to why certain aspects haven't been included

## What have you learnt?

- Line user testing up from the start
- Keep senior officers cited on tool throughout
- Chunk the work up – landing page, estimator & other finance pages
- Agree focused piece of work (without the distractions)
- Marry ambitions with timescales more carefully
- Keep persisting!





## What is coming next?

Looking Local Full Financial Assessment pilot comes to an end, we switch over to the Access Community Gateway Full Financial Assessment in May

The online option was easy and efficient

I still need to re key the information into MOSAIC

No preference means more options

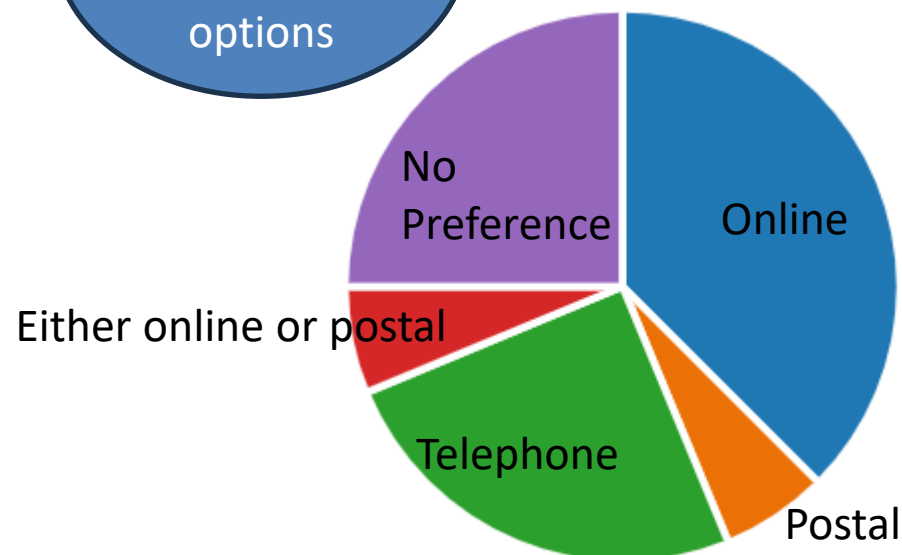
**Account Registration and Online Forms**

To start using portal, please start with the Current Year Assessments

- User Registration for My Online Account >
- Continue Self Assessment >
- Continue Financial Assessment >
- Select a Change Request >

**Current Assessment status**

Name	Reference	Submitted On	Progress Update
User Registration	9BUIAETG	Thu Jan 25 2024	<a href="#">Submitted</a>
User Registration	4VW8CSZ9	Wed Nov 29 2023	<a href="#">Submitted</a>



# **Implementing 'I need tools', and managing expectations at the front door**

**Corinne Barrett, Digital Programme Lead for Children's and Adult Services**  
**Trusha Patel, Digital Communications and Change**

# A bit about the project

# The three conversation model

Redbridge have adopted a [3 conversation model](#) as an approach to delivering Adult Social Care.

1

## **Listen and Connect**

The First contact team speak to residents and offer guidance, advice or equipment based on their needs.

This requires empathy and skill to get to the root of someone's need.

2

## **Tactical, short term support in a crisis**

Conversation 2 is used to understand what's causing a crisis, create an 'emergency plan' and ensure that interventions take place.

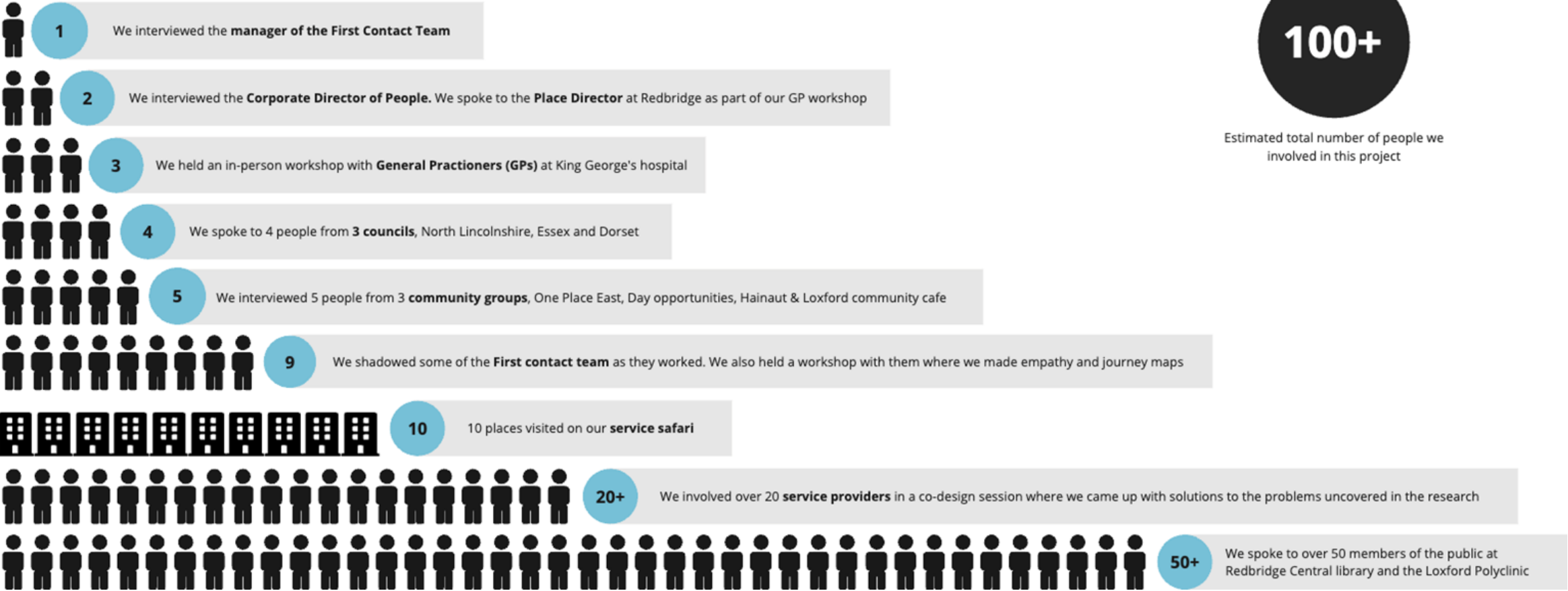
3

## **Long term support planning**

This is about understanding what good looks like for the resident and helping them put long term plans in place so they can achieve it.

Whilst the 3 conversations model is seen as having a positive effect on residents, **having conversations take time** and Redbridge council are stretched for resources

We spoke to a range of service users and providers using different research activities.



# What do people come to the ASC for?

We asked the First Contact Team to share their thoughts on the sorts of queries they manage on a day to day basis. There were 4 main types of outcome.

## "I just need someone to help me"

These kinds of issues are at a point where someone can't do something themselves and really want the service to take action to solve the issue.

I need help with caring for someone	I need help with personal care	Can't get hold of my GP	I've had a fall	I'm struggling [with my mental health]	I need help with the house (plumbing, gardening)
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## "I want to know what I'm entitled to"

We heard a number of different requests around what funding or grants are available and people wanting to know what they're entitled to financially when trying to resolve their care needs.

How much will my care cost?	What will the council pay for?	What can I get/access for free?	What grants are available?
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## "I don't know where to start"

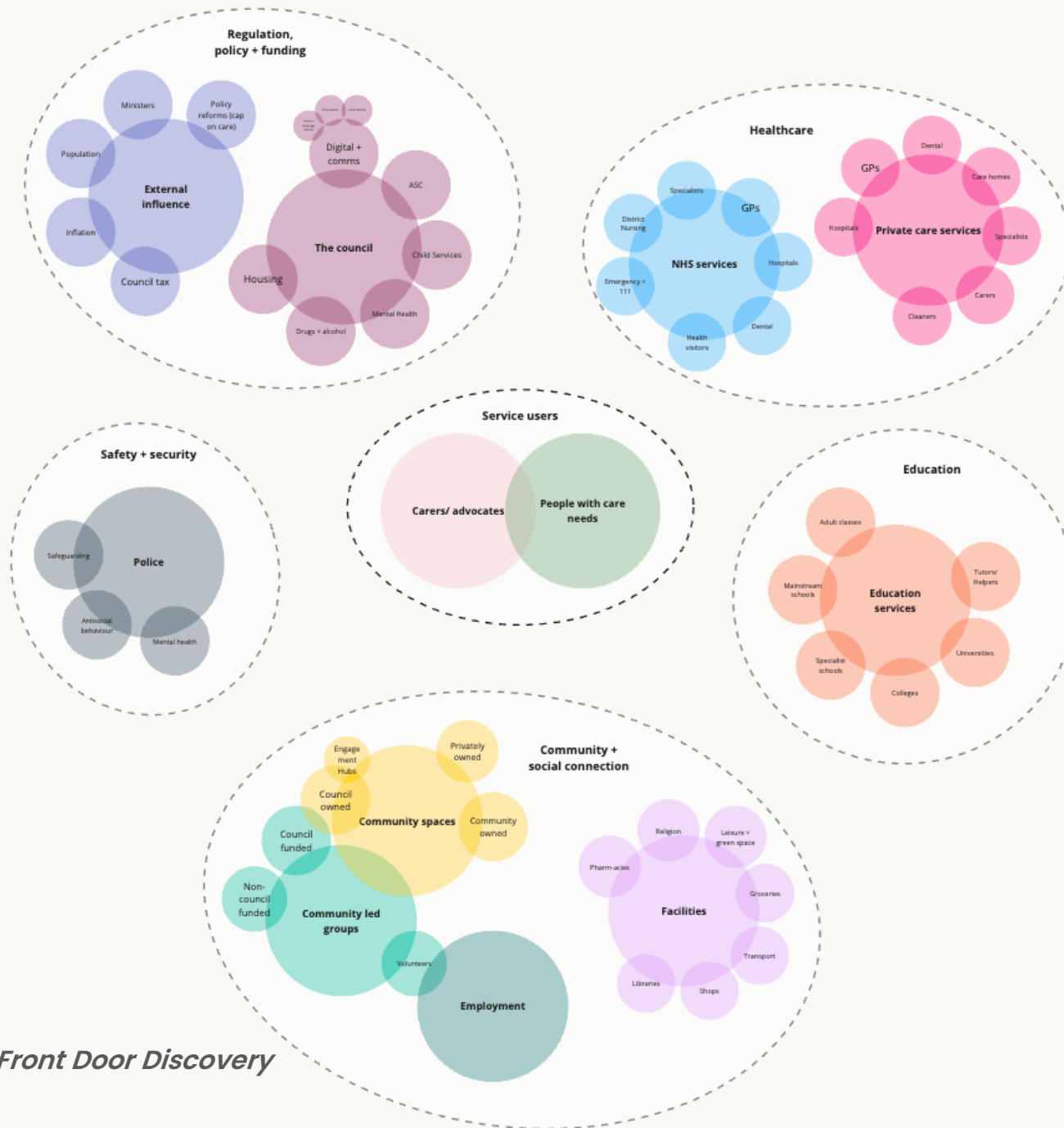
Navigating health and social care services can be daunting. These types of enquiries were information seeking, or raising issues to an empathetic ear in the hope they could identify what to do next.

I don't feel safe	I'm worried about someone	I want to learn more about a health condition	I need a break (from caring)	What support is available for my condition?
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## "How can I make life more comfortable?"

This is more solution focused and based on tactical fixes to living independently such as buying some equipment.

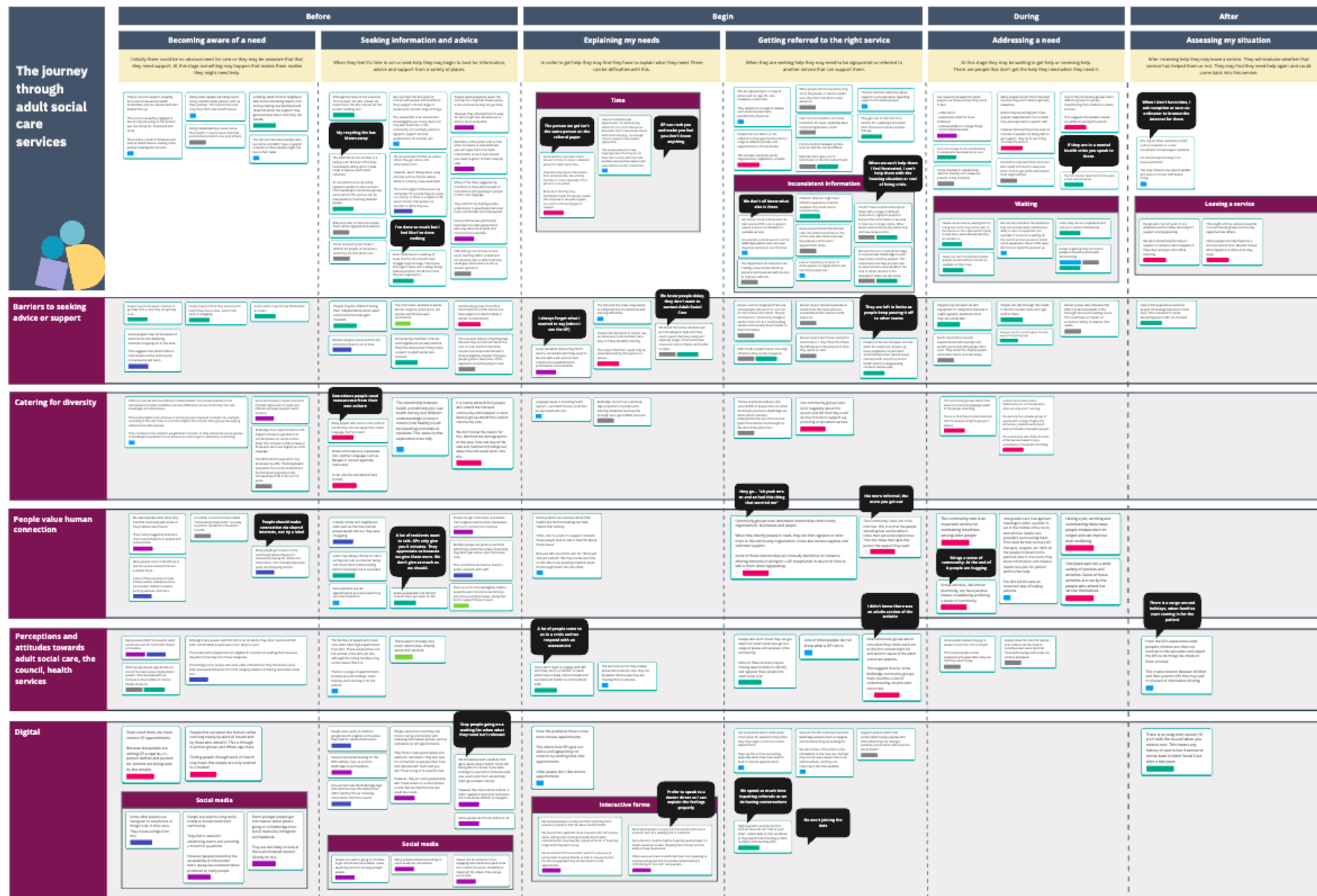
I need some adaptations to my house/rooms	I want to get an extension	What can I do to be more comfortable at home?
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How can we make the most of opportunities outside of the council?

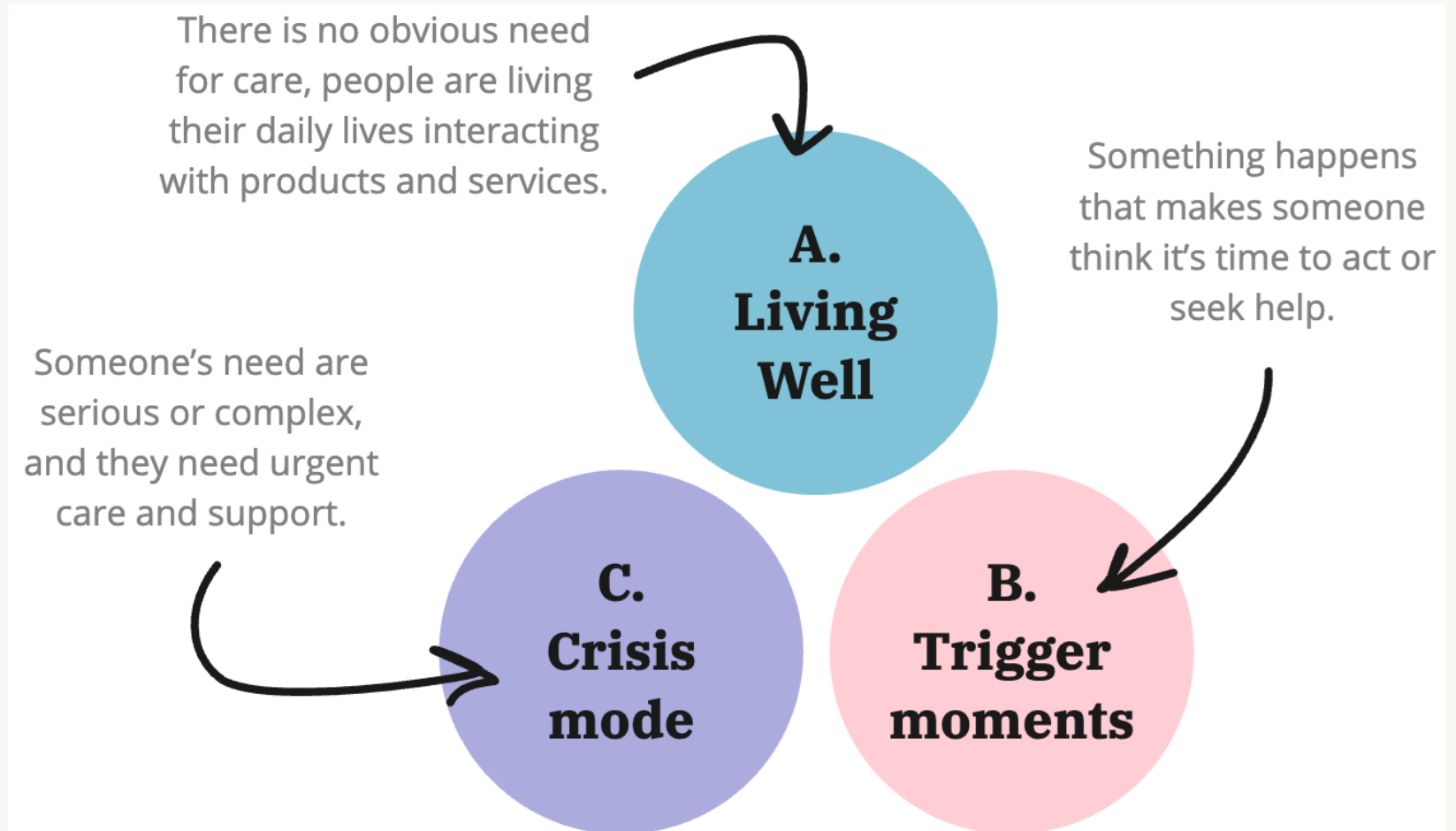


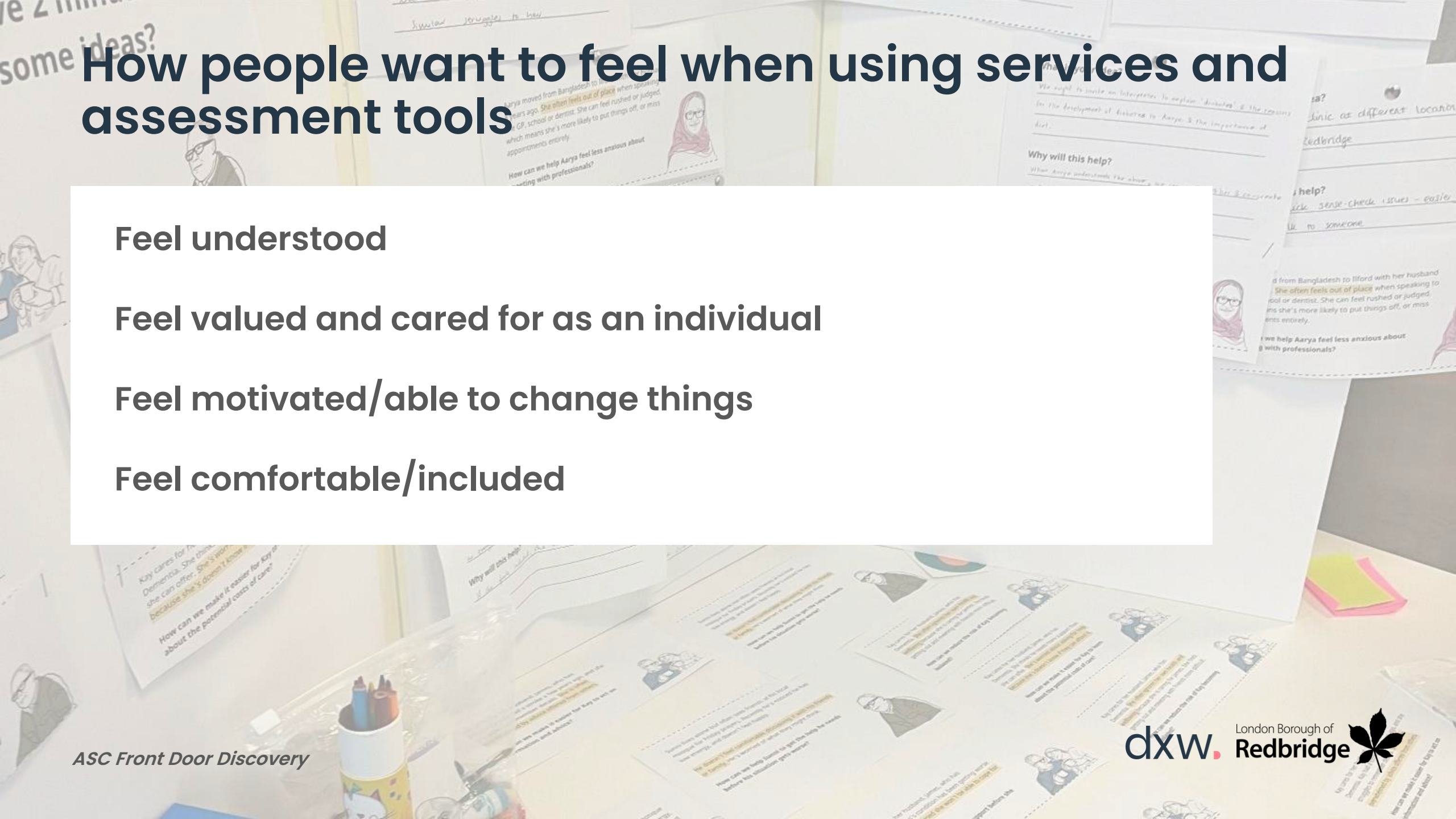
**We found  
common  
themes  
across this  
journey**





# Preventing people from going into crisis





# How people want to feel when using services and assessment tools

- Feel understood
- Feel valued and cared for as an individual
- Feel motivated/able to change things
- Feel comfortable/included

# Thinking about solutions...

# 8 service concepts

**1.  
Help Hub**

**2.  
Made for  
me**

**3.  
Follow up  
notes**

**4.  
Train me  
to triage**

**5.  
Do I need  
to pay?**

**6.  
My  
Redbridge**

**7.  
Auto-  
referral  
service**

**8.  
I Need  
Help  
Tool**



## Do I need to pay?

Check if you are eligible for financial support with your care.

Use this service to:

- get a quick indication of whether you might get assistance with paying for care
- get information about next steps for you

This should take less than 5 minutes.

[Start now >](#)

< Back

## Type of care

- ☐ Care at home
- ☐ Residential care/ Nursing home
- ☐ Equipment

[Continue](#)

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## Savings and investments

Your eligibility for financial support depends on how much capital you have. This is the total value of cash, savings and investments you hold.

How much capital do you have?

- ☐ Between £0 and £14,250
- ☐ Between £14,250 and £23,250
- ☐ More than £23,250

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## Eligibility for financial support

### Check your answers

What type of care is needed? [Change](#)

How much capital do you have? [Change](#)

Do you own your own home? [Change](#)

**Eligible for some financial support**

You will have to pay a contribution to the cost of your care from your income, plus an extra

## Do I need to pay?

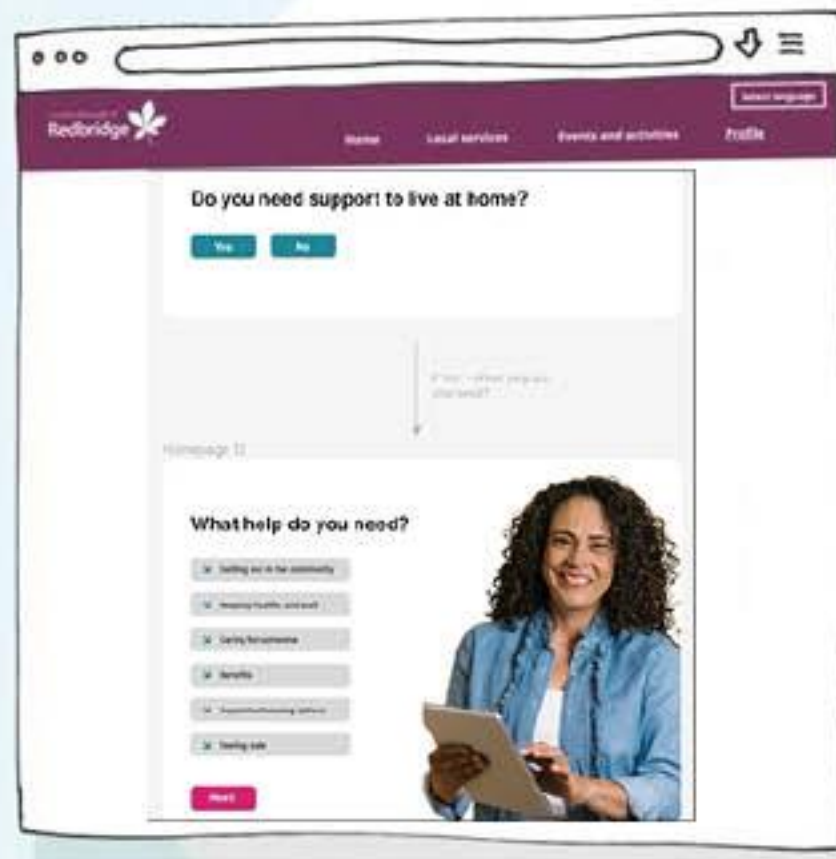
Get a quick indication on whether you'll need to pay for your care through 3 simple questions.





concept

8



## I Need Help tool

A tool that enables Conversation One to be online and triage quickly either to information or an officer

# What's next?

# A new service experience

Before

Becoming aware of a need



Seeking information and advice

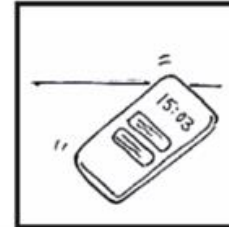


Begin

Explaining my needs

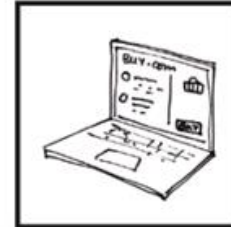


Getting referred to the right service



During

Addressing a need

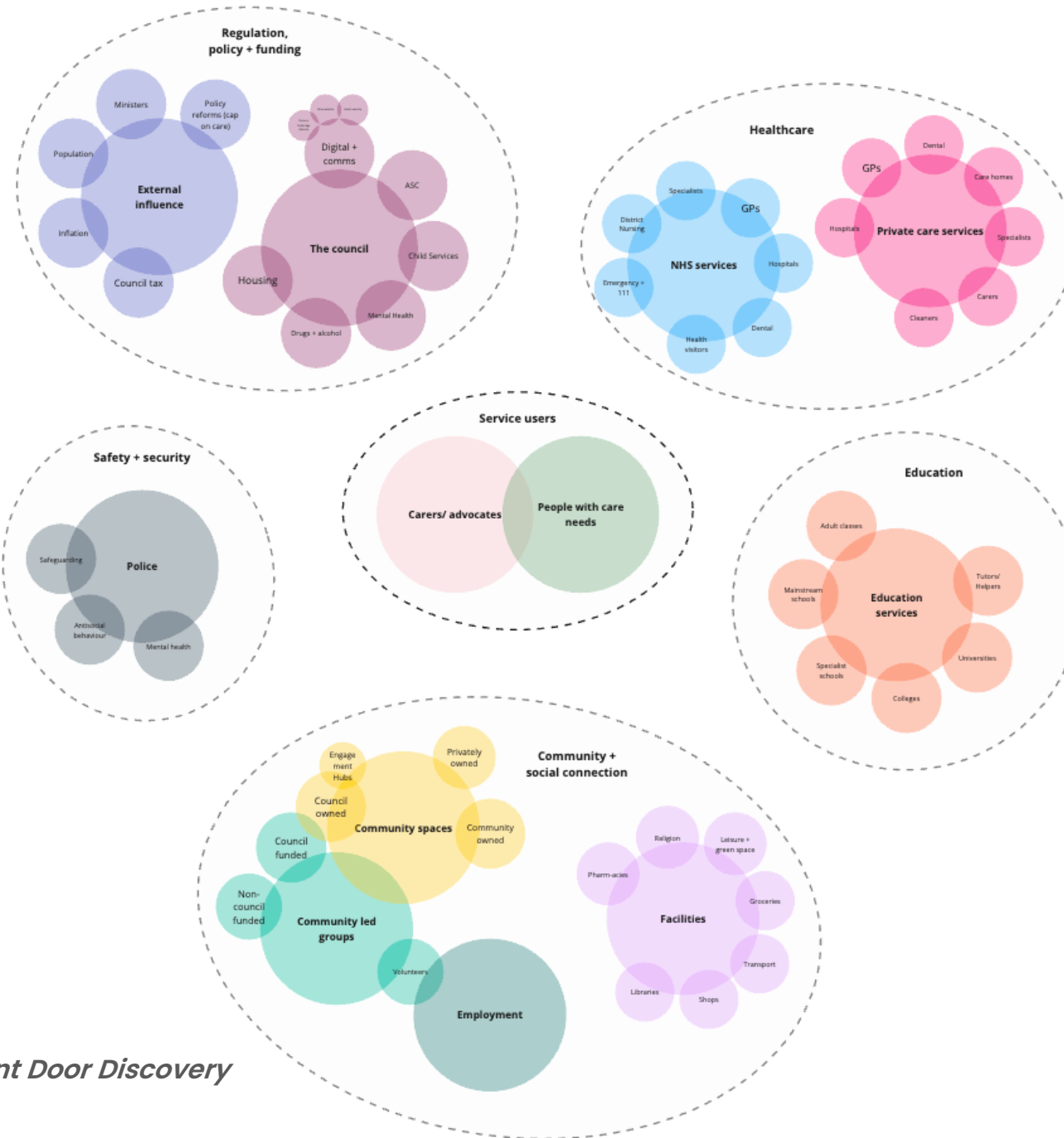


After

Assessing my situation







# An ongoing mindset

# **Open discussion**



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Local  
Government  
Association

directors of  
**adass**  
adult social services

Partners in Care  
and Health

Thank you for your participation, and to Kent, Dorset and Redbridge Councils for their presentations.

This webinar was brought to you by DHSC, SCIE and Partners in Care and Health working in partnership.

# Thank you



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<https://www.scie.org.uk/myscie/register>

