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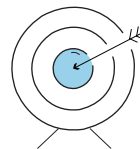
Online Financial Assessments

Overview

Business Case

Main Features
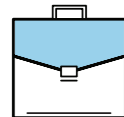
Case Studies

Overview

Members of the public can go online and easily calculate their likely contribution towards social care. Financial assessment settings are integrated with ContrOCC so can be set to reflect both national and local charging policies. Completed assessments can be saved, printed or submitted to the local authority.

Service users and representatives can:

- Find out if they will need to contribute to the cost of care
- Submit estimated assessments and evidence directly to the local authority

The local authority can:

- Easily pick up and review the digital assessments in ContrOCC
- Customise the questionnaire text to guide citizens through the process

Business Case

Feature	Benefit
Members of the public can complete the assessment online at their convenience	Reduce the need for onsite visits
Online submission of assessment forms and supporting documents	Reduce demand on resources: less paper, less time manually inputting data, faster completion of assessments
Quickly notify users that they may be over the savings threshold and provide further information	Efficiently signposts self-funders away from the council front door
Easy to use questionnaire with customisable information and help text	Increase the transparency of the assessment process
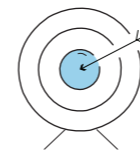
Main Features

User friendly design

The Online Financial Assessments module provides a modern, easy-to-use financial assessment form for service users or their representatives and complies with GOV.UK style guidelines.
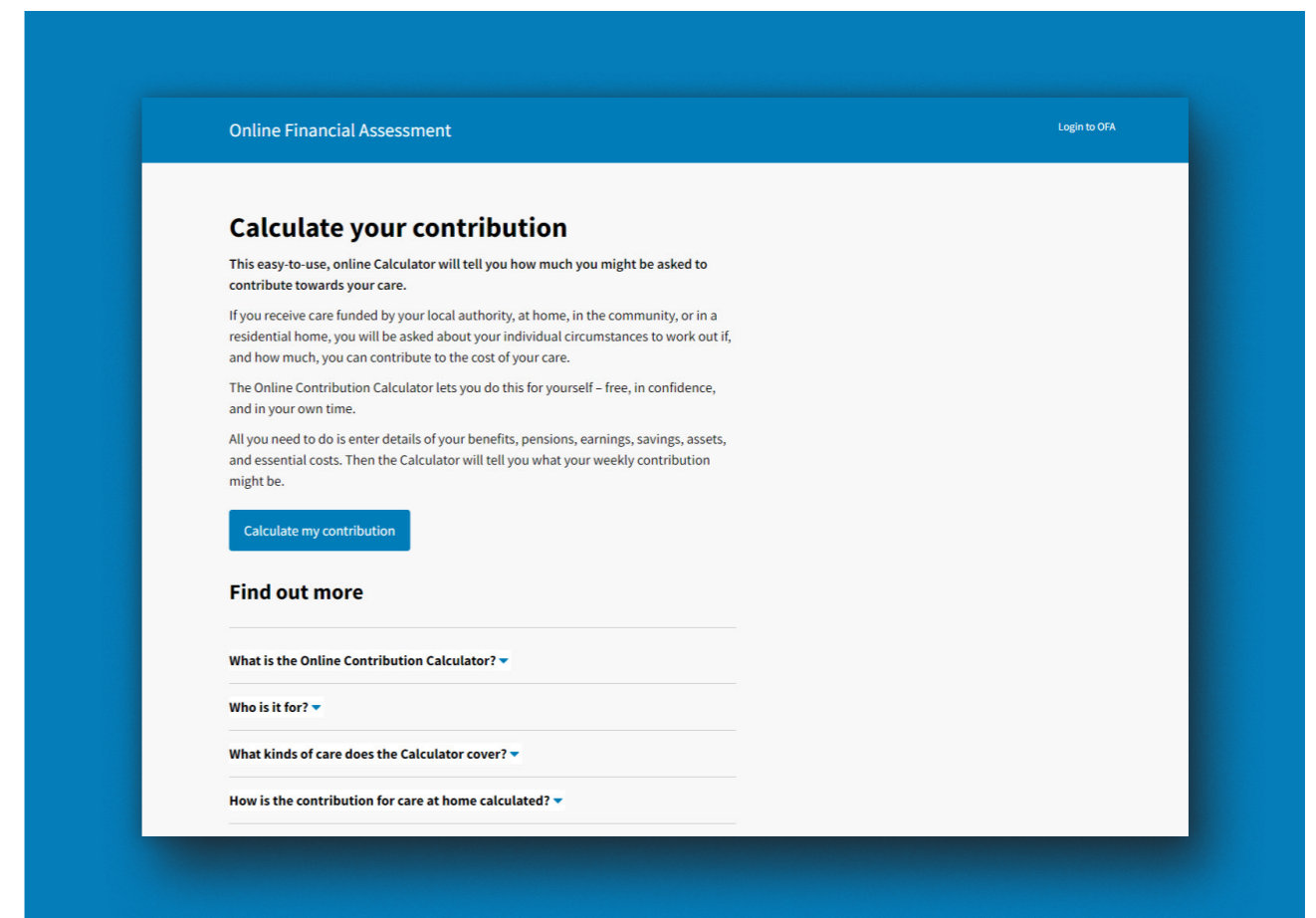
Back office integration

The website uses exactly the same calculations and underlying data as ContrOCC. Completed self-assessments and supporting evidence can be submitted to ContrOCC for review and further action.
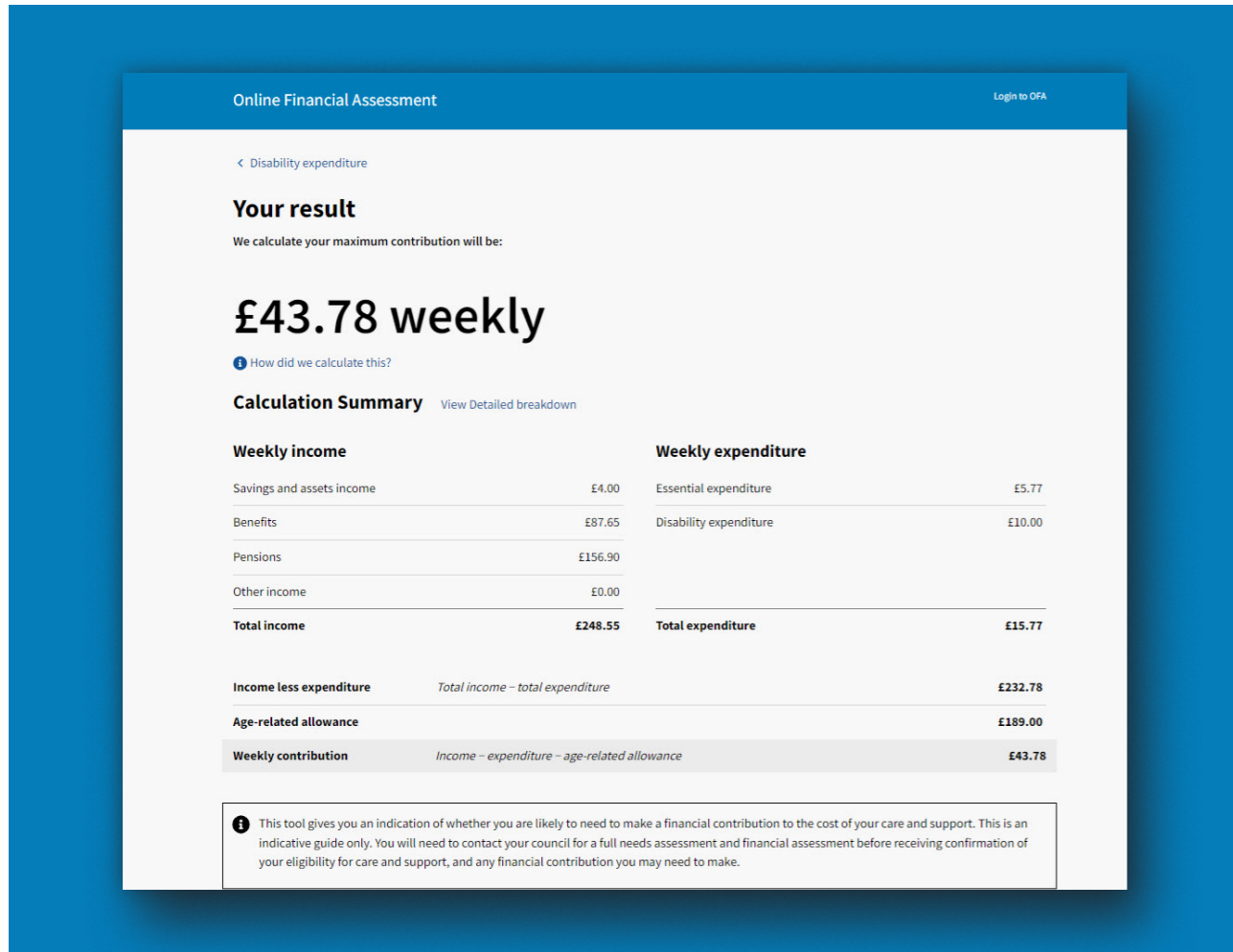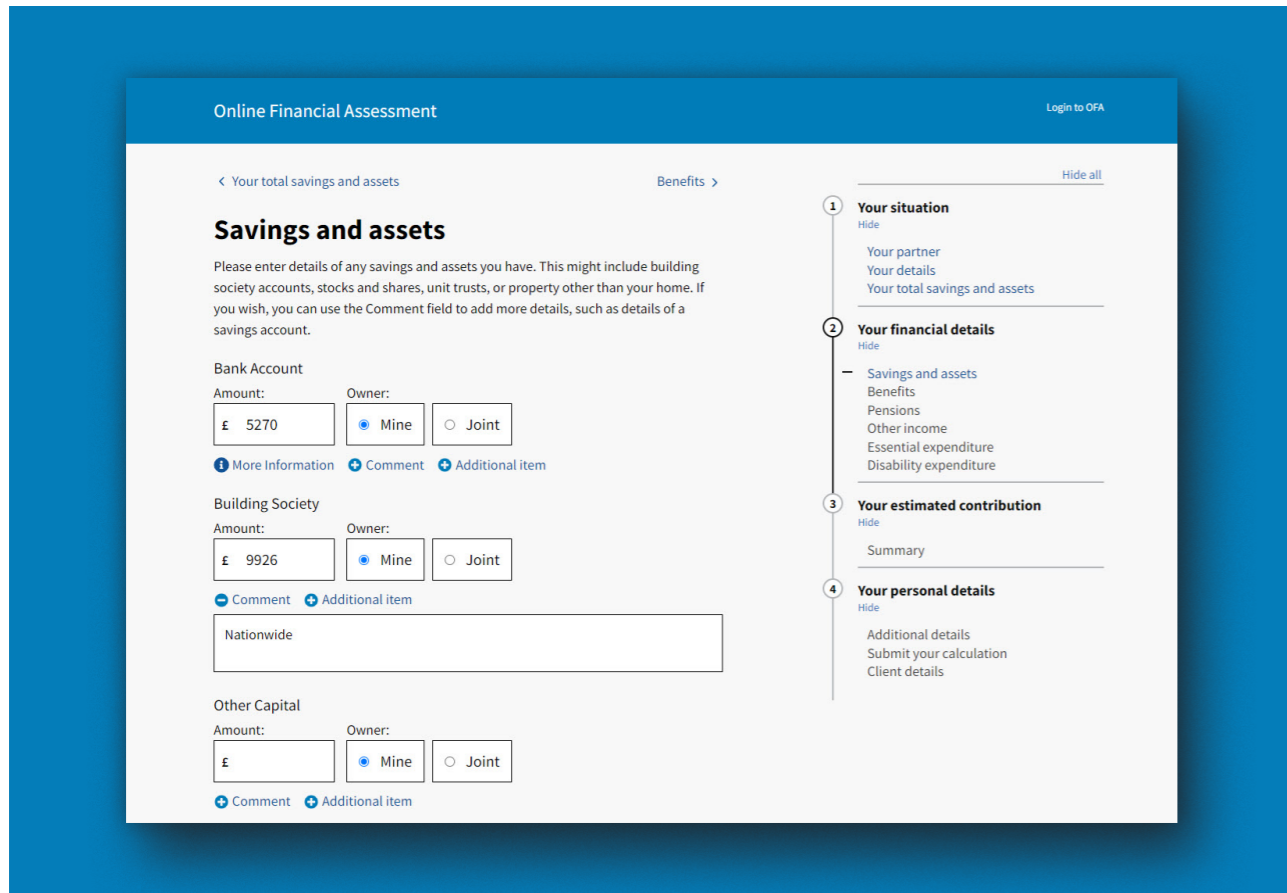
Up-to-date

OCC is committed to developing the product in line with changes in policy, such as new benefits or revised capital rules.

Accessible language

Users are guided step-by-step through the self-assessment process. This prevents users selecting incompatible options. Configurable help options are available throughout the module.

Online Financial Assessment

Login to OFA

Calculate your contribution

This easy-to-use, online Calculator will tell you how much you might be asked to contribute towards your care.

If you receive care funded by your local authority, at home, in the community, or in a residential home, you will be asked about your individual circumstances to work out if, and how much, you can contribute to the cost of your care.

The Online Contribution Calculator lets you do this for yourself – free, in confidence, and in your own time.

All you need to do is enter details of your benefits, pensions, earnings, savings, assets, and essential costs. Then the Calculator will tell you what your weekly contribution might be.

Calculate my contribution

Find out more

What is the Online Contribution Calculator? ▾

Who is it for? ▾

What kinds of care does the Calculator cover? ▾

How is the contribution for care at home calculated? ▾

Surrey County Council

- Anouska Howells-Cook, Business Support Manager at Surrey County Council, spoke to us about Surrey's experience of implementing the OCC Online Financial Assessment tool (OFA)

Why did Surrey implement the OFA?

Prior to the OFA rollout, Surrey would offer in person visits, or telephone assessments. A shift towards digital self-service at the council began in 2017. The software really tied in with the council's vision of transforming the customer journey by moving services online. The OFA gives customers the opportunity to decide how and when they want to provide the financial information.

> *It enables residents to see where they stand financially when seeking care*

As well as helping to advance the council's digital strategy, the module has brought about several benefits at Surrey.

Reducing backdated charges

Processing financial assessments swiftly means that the council has reduced the need to bill backdated charges.

A decrease in travel costs

Dramatically cutting down the number of in-person visits has been of enormous benefit to the council.

> *Travel costs at the council have hugely decreased, as the need for officers to conduct in-person visits has been reduced. Surrey County Council covers a vast area, and travelling to visit customers could take finance officers up to an hour. Team members would arrive for scheduled appointments to discover that either nobody was at home, or key information was not to hand. Implementing the tool has reduced the drain on resources this could potentially lead to. Continuing to use the software, even post-pandemic, is absolutely a real focus for Surrey.*

What has been the reaction at Surrey?

Clear and timely information for service users

Financial assessments are sent to customers prior to services starting, and they are asked to complete the online form within five days. After the form is submitted, one of the team members at Surrey will request that evidence is provided too. The OFA gives a clear indication to customers as to how much they are likely to contribute. It provides a means of informing people about charging policies, capital thresholds and disregards before services begin. The team at Surrey aim to speak to the service user within 24 to 48 hours of the OFA being submitted, so that they can have timely conversations with customers about client contributions. This is to verify the information they've provided, make sure it is accurate, and confirm the charge. The OFA provides an invaluable step in the process.

Impact on council staff

The council team of approximately 50-60 staff members generally received around 500 referrals per month. Throughout the pandemic the council removed all visits and focused on the OFA. Approximately 70% were online, and 30% were telephone assessments. Service heads within the team have however not decreased due to the changes. The move online has simply freed up some of the team to shift their focus, and work on debt management instead. Staff buy-in levels at the council were high, despite the change in approach for the assessment team. Surrey has even worked with internal IT resources to create a robot that accepts the submitted results into ContrOCC.

> Being able to redirect resources away from in-person visits has allowed Surrey to focus on giving benefit advice and getting the financial assessments right first time. Accurately assessing the charges has certainly sped up the decision for adult social care colleagues who need an answer quickly as to whether a customer should be a self-funder, full cost, or should pay a contribution. Internal coworking within the council has improved, as social care colleagues can receive information in a timelier way.

How did Surrey promote the tool?

The council collaborated extensively with the voluntary sector, emphasising the benefits and potential for improvements to the customer journey. A soft launch took place in October 2017, where Surrey promoted the OFA to customers and highlighted the advantages of being able to complete the assessment at their convenience. Face-to-face visits and telephone assessments were still offered as a back-up during this time.

In 2018 the council ran a large-scale campaign to promote take up. This included:

- Visiting social care teams
- Attending team meetings in hospitals
- Putting posters up on public transport
- Radio adverts
- Social media posts and videos

The council appointed OFA champions to spread awareness of the campaign. The team distributed postcards detailing key information and outlining the benefits of the OFA. Next, the council analysed the entire customer journey, from the point that the assessment form was sent out. Some customers did not return the form, and some were unable to log in. Process improvements were introduced to iron out potential problems. The launch campaign and subsequent analysis of the customer journey has helped to make online assessments the default solution.

> It can be completed anywhere, on any device, including iPads, laptops, computers, and android systems.

Reflections on using the OFA tool during the pandemic

Since the onset of the pandemic, the OFA has been presented as the first port of call for customers.

Uploading evidence within the tool is simple, or customers can email it to the council afterwards. For Surrey, client computer literacy levels have not proved an obstacle to launching the software. 70% of the residents have an advocate, such as a son or a daughter, and the OFA has been of huge benefit to them.

Further details

If you would like further details about the module, please do contact your account manager or one of our product managers.

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