

## Hackney London Borough Council processes 50 per cent more client financial affairs cases thanks to easier reconciliations, notes handling & OPG reporting in Trojan Caspar

Today, the Client Financial Affairs team at the London Borough of Hackney manages benefits payments and bill settlement for over 300 active client accounts, as well as the residual financial affairs of a further 150 deceased individuals - as loose ends are tied up and until probate is settled. Around 10 new client cases come in each month, and a further five deceased-client referrals. Five years ago, the total annual case load was around 200 clients, so workloads have grown by more than 50 per cent.

In 2014, the Council moved its Deputyship and Save for the addition of an administration assistant, Hackney Council has been able to handle the additional case volumes with its existing small team of five people. This is partly thanks to Caspar, a specialist software system from Trojan Consultants for managing the financial, investment and property interests of Appointeeship and Deputyship clients.

By automating, tracking, reconciling and reporting on client financial activity, the system allows Hackney's small team to process workloads more efficiently, freeing up capacity to take on more cases.

### Caspar: the default system for local authorities

The Caspar system was brought in about a year before Client Financial Affairs Manager, Helen Corman, joined Hackney Council in 2013, but she was already familiar with the system from her time at the London Borough of Camden which also uses the software.

“At Hackney, the system was brought in originally for completing reconciliations of third-party direct payments for care packages and so on, though we now also use it for client notes and OPG reporting,” she explains. The biggest win is the time this gives back to staff, she says, although there are numerous additional benefits - including improved status visibility within and across client cases.

Now financial reconciliations happen automatically, using the bank file upload facility to directly import and reconcile transactions on the system. “When we implemented this, we saw the benefits immediately,” Helen says. “Previously someone handling 70-80 cases could be spending two days managing reconciliations and associated queries; now we’ve got that down to half a day. Meanwhile, across 170 clients, a week’s worth of third-party direct payments/managed accounts can be processed within a couple of days – down from a week.”

Being able to manage client notes directly in Caspar makes a big difference too. “This is really useful. Without this facility, we would have to clog up the social care database with a lot of information that social workers don’t need access to,” she explains. “With Caspar, we can keep everything all in one place, so it’s easy for anyone on this team to manage and find.”

### Greater visibility, improved team capacity

Hackney Council already uses Caspar for annual reporting to the Office of the Public Guardian (OPG) but Helen envisages using the system for additional internal reporting in future. “We’ve only scratched the surface of what’s possible,” she says. “Caspar allows OPG reporting to be done in 1-2 hours, instead of what could be days of manual data collation and calculations. So there’s certainly more we could use it for – for gaining a quick overview across all cases, or a snapshot of deceased-client affairs, or clients with more than £X of savings, for example.”

Strategically, by freeing up the Client Financial Affairs team’s time, Caspar also makes it possible for the Council to provide more comprehensive services, with a fuller Deputyship remit. “Today around 100 of our cases are in that category, and as a proportion of our work these cases are growing. Our aim is to do more of this work, if we can find the time/resource it properly - which Caspar helps us to do,” Helen says.

She is enthusiastic about the planned migration to Caspar Cloud, the forthcoming hosted/Software-as-a-Service (SaaS) version of Caspar, which will be updated at more regular intervals with new features and functionality. “Something that really interests us is the pre-payment card integration, which again could simplify the way we manage monies with clients and reconcile this back into our records. This and the enhanced banking function are of great appeal.”

Of Caspar generally, Helen adds, “I don’t know of anything else like it on the market. The system is invaluable in helping us keep track of a huge workload, marrying up all the detail and keeping accurate, traceable records. It saves us a great deal of time, and frees us up to do more of the client work we’re here to do.”

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