

Sunderland City Council makes light work of its soaring Court of Protection client caseload thanks to centralised control & visibility enabled by Trojan's Caspar.

Over the last decade, Sunderland City Council has seen demands on its Financial Safeguarding Team soar. Today a team of 11 people, including 7 case-workers, manage the financial affairs of over 700 people. The vast majority of these are Deputyship/Court of Protection cases, the remainder a mix of Appointeeship clients and those whose property or funerals the Council is responsible for managing.

Keeping track of all of these cases, and ensuring that individuals' benefit entitlements, care packages and related budgets are carefully balanced, would not be possible without the coordinated oversight provided by Caspar from Trojan Consultants. Caspar is a bespoke software system, designed for teams looking after the practical and financial interests of vulnerable people.

Control through central coordination

Sunderland Council has been using Caspar since 2010, when a team of just 4-5 people was trying to cope with rapidly growing demand on its financial safeguarding services.

"Our council has a policy of not turning away any referrals, and the demand on our service has gone through the roof over the last 10 years. But, until

we implemented Caspar, we didn't have anywhere where we could centrally hold information," explains Senior Caseworker, Laura Smith, part of the Financial Safeguarding Team, which operates under the Council's Neighbourhoods Directorate.

"Previously all of this information, including records of every call or email, was dotted about all over the place - on paper, in Word documents - hard to track down, and making it impossible to gain a quick overview of clients or cases."

The Financial Safeguarding Team is based between two office locations. Although these are next door to each other, relying on physical, paper-based case files would mean having to go between offices to rifle through paperwork, a very time-consuming activity. And when a caseworker is out or absent, it would be impossible to get a quick and up-to-date overview of what is happening with a client's finances.

All client records & case notes in one place

Today, everything - all financial records and client notes - are held centrally in Caspar. This is true not just for Appointeeship or fuller Deputyship/Court of Protection client files - which together account for around 500 of the 700+ clients currently on Sunderland City Council's books - but also for a further 200 individuals for whom Laura's team protects property interests or is tasked with handling funeral arrangements.

"The fact that we can put everyone into a single system is fantastic," Laura says. "Even if we're only using the Note tabs for some clients, it's enormously useful to have one common place where everything is recorded."

Caspar soon made itself so indispensable to the team that, now, the first thing everyone does when they turn up to work in the morning is open Caspar.

“It’s our first port of call – to the point that I can’t answer the phone without it, because that’s where all our records are kept,” Laura explains. “With Caspar at our fingertips, we can see at a glance what’s happening with a client and give a rapid response. Before, we would have had to take a message, go off and find the information, and then call the person back. Once Caspar is open on the screen, that’s all we need. Everything is there, in one place.”

Caspar’s Diary Action function is particularly popular with Laura’s team, as all of the caseworkers routinely put in all of their ‘to-do’ items, with all of the associated detail. “We all love this facility,” she says. “It is our default place to record everything for the week ahead, so if someone is off sick, it’s really easy for someone else to pick up a case and run with it.”

Effortless reporting

Another huge benefit of Caspar is its intuitive reporting capabilities. In addition to obligatory reports for the Office of the Public Guardian (OPG), Sunderland Council does a lot of internal management reporting. “We produce a lot of management statistics each month, and can analyse cases by volume, type, client age, and more,” Laura notes. “The more information we put in, the more we get out.”

Official reporting takes very little time now too. “Before, even Deputyship reports were hand-

calculated, which took at least a couple of hours and even then they wouldn’t necessarily be right first time,” she says. “Now we’ve got it down to 15 minutes, and we know the reports are accurate because it’s all come straight from the latest central electronic records.”

While Laura admits that there are still some features of Caspar that her team has yet to tap into, such as linked automatic bank records reconciliation, the fact that case workers keep up-to-date, centralised electronic records of everything is a big time-saver. “Even without the part that can talk to banks directly, we’re still 100 per cent more efficient compared to the manual checking and tallying we were doing before,” she says. “Now that we do everything in Caspar it saves hours.”

Actionable management insights

The increased visibility provided by Caspar means not only that the Council team is more responsive to client queries, but also that the team has greater insight into evolving caseloads as a whole. “For example, it’s probably down to Caspar that we handle so many more CoP clients now,” Laura says. “For us, the threshold for applying for CoP/ Deputyship status is when we’re managing financial activity over the value of £4,000. With Caspar we can quickly spot when we are at that point.”

More recently Sunderland Council has been looking at Caspar Cloud, the new hosted/ Software-as-a-Service (SaaS) version of Caspar.

Talk to our team to find out more



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In the future, Laura envisages making greater use of Caspar's automated alerts and reports, which prompt caseworkers about under- or overpayment of benefits, or signs of capital limits being exceeded, so that appropriate action can be taken swiftly.

The Council expects to make use of straight-through bank reconciliation in future too, keen to maximise the fuller benefits Caspar offers, Laura says.

She adds that the Council couldn't be in better hands. "Trojan have been brilliant with us," she notes. "The training when we first started with Caspar was great and, once the system was set up, we needed very little additional help. Still today we use the same reports.

"I honestly don't know how we'd manage without Caspar," Laura concludes. "We rely on it completely."