



A CASE STUDY

Merton Council's Client Financial Affairs team transforms monthly account reconciliations with Caspar from Trojan.

Merton Council, the public administration for the London Borough of Merton to the south of the city, looks after the personal finances of between 200-250 vulnerable clients each month, processing their benefits and rent payments and, in the case of Deputyship clients, broader financial decision-making and spending.

In recent years, the Council's Client Financial Affairs team, constituting just five people including the service's manager and an admin officer, has made a conscious decision to take on more Court of Protection referrals, balancing up the ratio between Appointeeship and Deputyship workloads.

It could not have done this without the automatic bank reconciliation facility in Caspar, a bespoke software system from Trojan Consultants which consolidates and streamlines Appointeeship and Deputyship case management.

"We moved to online banking in 2016, and implemented Caspar not long after that, as it perfectly complemented electronic payments, allowing easy, automated account reconciliation," explains Jacky Greenfield, the Council's Head of Client Financial Affairs.

"Before that, we did everything – I mean, everything – manually. We had one bank account per person, and one spreadsheet per person. So each month, account reconciliation took the best part of two days. It was tedious beyond belief, and there was always the worry that the spreadsheets might corrupt, or a mistake might be made," she notes. "This made the Audit team very nervous – they didn't like the way we were doing things. It was too vulnerable to error."

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Jacky's team had come across Caspar sometime earlier, after being invited to an open day run by Trojan to learn about the product. "We looked at the system, and loved it instantly," Jacky says. "All we had to do then was convince the higher powers that this was something we needed."

When the Client Financial Affairs team transferred to different management, as part of an internal reorganisation, Jacky found the door to transformation opened wide. "Our manager could see the logic of electronic payments/online banking, and agreed that it made sense to adopt Caspar to maximise the benefits and streamline reconciliations," she says. "We didn't need asking twice."

Saving time, reducing risk

Since implementing online banking, and cementing the associated efficiencies by deploying Caspar, Merton Council has seen workloads become more manageable, not least because it is able to claw back two days each month - previously given over to line-by-line bank/financial account reconciliation for each client. This is now a much less manual affair, which reduces the risk of error. "The way we do things now is so much smarter," Jacky says.

"There is so much more to Caspar too, which we haven't even tapped into yet because we're such a busy team," she adds. For instance, Caspar has the facility to produce prepopulated OPG annual reports using reconciled data from Deputyship accounts. Now that closer to 100 of monthly cases fall under this category, Merton Council could really benefit from this facility. "In many ways we have only really scratched the surface of what Caspar can do", Jacky notes.

"There are definitely features we don't currently use, but should - such as running reports for fees, and so on. And I know it will ease the burden on this small team. Because I am managing casework myself, as well as the team, I frequently find that I am overstretched, so I need to lean on Caspar more."

"Certainly, I love the system and plan to use it increasingly. Without question, it makes life a lot easier, and the team at Trojan are always on hand to help, which we appreciate."

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