

Welfare Rights Case Management

MULTI SERVICE COLLABORATION

Support for :

- Benefits Advice
- Money Advice
- Inter Service Referrals
- Benefit Uptake
- Campaigns
- Initiatives

PRO-ACTIVE CASE MANAGEMENT

Cases are managed effectively from initial enquiry through to final outcome with all follow-up actions automatically diarised and monitored

INNOVATIVE

“An innovative solution for welfare rights management which can transform the approach taken to collaborative advice provision”

W.R.C.M. is a unique solution, which enables multiple services and agencies to collaborate effectively in order to provide the overall advice and support required by those in need.

The Key Features of this remarkable system are :

◆ Innovative

The WRCM system provides a Common Case which can be shared securely between different resources, or agencies, who are providing different aspects of advice and support to the same client.

◆ Campaign / Initiative Management

Campaigns and Initiatives can be created and case work related to these identified and reported. This allows the Outcomes and Benefits achieved by different programmes to be easily and accurately assessed.

◆ Multi Resource

Enquiry Types, Follow Up Actions, Outcomes etc can be created to reflect the different focus and workload of each resource.

◆ Case Referrals

Referrals to other resources and agencies can be easily created and the resulting outcome recorded.

◆ Client Profiling

Profile clients by Age, Gender, Ethnicity, Marital Status, Employment, Family Composition etc. in order to analyse the needs of each group.

◆ Work Management

Case assignment to Case Officers allocates responsibility and the integrated Diary allows all planned follow up activities to be easily managed.

◆ Money Advice

Comprehensive Money Advice facilities are incorporated into the system and forms part of the Common Case details with strictly controlled access.

◆ Benefits Advice and Benefit Take-up Programmes

Comprehensive Benefit Advice, Claim and Appeal facilities are also incorporated into the system.

◆ Best Value

The WRCM system provides Best Value by reducing the resources required to effectively manage and administer the Welfare Rights caseload in line with Best Value objectives.

◆ Affordable

The system is available on either the traditional licence and support fee basis or the more easily budgeted fixed implementation cost and monthly rental option,

The screenshot displays the 'Case Details' window for case ECNR1/0010. The interface includes a menu bar with options like 'Details', 'Actions', 'Enquiries', 'Claims', 'Supersession', 'Renewals', 'Revisions', 'Appeals', 'Commissioner', 'Money Advice', 'Documents', and 'Notepad'. The main form is divided into several sections: 'Client/Partner Details' with fields for Client (Mr A Greig), Partner (Mrs E Greig), Marital Status (Single), Employment (Employed Full Time), Telephone (01430 45 0111), Children 0-15, Children 16-18, and Non Dependents; 'Property Details' with Address (Stable Flat, 72 High Street, Biggar, ML12 6BJ) and Tenure (Council Tenant); and 'Source' (Self) and 'Method of contact' (Campaign). There are also checkboxes for 'PwP', 'Joint Visit', 'Office Visit', and 'Joint Interviews', along with a 'Benefit check' section and a 'Comments' text area. The bottom of the window shows 'Last updated: 07/09/2005 by Merchant Software (ECNR1)' and a 'Print' button.

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Multi Service Co-operative Working

The WRCM system supports the joint working of different Services and Agencies (Teams) who wish to work co-operatively to provide the support and advice required by clients.

To achieve this, a Common Case is created for each Client. Each Team is able to access the Common Case and view the information available on all aspects of the advice and support provided, subject to security restrictions on sensitive information. In this way all of the Teams are aware of the actions being taken by other parties and can co-ordinate their activities.

Each Team is able to enter and manage their own Enquiries, Actions, Referrals, Outcomes etc while being able to view the information entered by others.

Campaigns / Initiatives

Campaigns and Initiatives are often undertaken to achieve specific objectives and to provide assistance to specific groups in need.

WRCM allows Campaigns and Initiatives to be created with a defined purpose and targets defined by the expected number of outcomes achieved of different types.

The work undertaken as part of these Campaigns / Initiatives can cover pro-active presentations, mailshots and training as well as handling the resulting case work.

Case work entered to WRCM is allocated to the Campaign or Initiative from which it resulted and the resulting outcomes are assessed as part of the Campaign / Initiative results.

The screenshot displays two windows from the WRCM system. The 'Case Details' window on the left shows information for Case Ref ECHRT/0016, including the address 'Flat 1/1, 40 High Street, Bigger, M12 6BJ'. It features a table of services with columns for Service, Description, Date, Next Action, and Closed. The 'Money Matters' section is expanded to show 'Housing Benefit' and 'Severe Disability Allowance'. Below the table are fields for 'Details' (Type, Source, Case Worker) and 'Actions' (Next Action, Date, No Further Action).

The 'Diary - Merchant Software (ECHRT)' window on the right shows a calendar view for April 2006. The calendar grid lists dates from Sunday to Saturday. A list of actions is displayed on the right side of the calendar, with columns for Date, Case Ref, Description, and Stage. The actions include items like 'Debt', 'Attendance Allowance', 'Council Tax Benefit', 'Credit Card', 'Housing Benefit', 'Rent', and 'Loan', each with a corresponding stage such as 'Enquiry', 'Review', 'Advice', or 'Equity'.

Integrated Case Management Features

The Welfare Rights Case Management system is unique as it incorporates Benefits Advice, Money Advice and Welfare Rights Advice features in a single integrated system.

WRCM ensures that Case Officers have access to the tools required to provide comprehensive support and advice to clients.

Central Case Database

All of the Welfare Rights case details and any information related to these cases are held on a single centralised database.

This approach provides many benefits. It ensures that all case details are held in a secure environment, it allows management to review the caseload, and the way in which the caseload is being handled by the Case Officers.

A key benefit is that quick and accurate management reporting of the full caseload is available at all times.

Workflow Management

Each enquiry within a case can be assigned to a Case Worker who will be responsible for undertaking any resulting actions. This allows the overall caseload to be allocated between the staff resources available and the workload of each Case Officer to be monitored.

Each action is dated and will appear automatically in the Case Officers Diary on the appropriate day as a reminder. The Diary is displayed automatically when each Case Officer logs on to the system. Any action which is not completed by the required date is displayed in a list of overdue actions. Management can access each team members diary so that in the event a Case Officer is unavailable the planned activities for the day can be checked and reassigned.

General actions and appointments can also be entered to the Diary.

Benefits Advice

Comprehensive facilities are available to support benefit related actions, e.g. Claims, Supersession, Renewals, Revisions, Appeals and Commissioner Hearings.

The outcome for each benefit related action can be recorded along with the Benefit Awards and Income Gain.

Benefits Take-Up Campaigns

A key part of any Welfare Rights programme is to ensure that as many clients as possible receive the benefits they are entitled to.

Utilising information from the revenues and benefits systems available, campaigns to improve the uptake of benefits can be managed. Each campaign can be created within the system and all related case work assigned appropriately. This allows the full benefit of each campaign to be clearly identified and the resulting level of benefit uptake quantified.

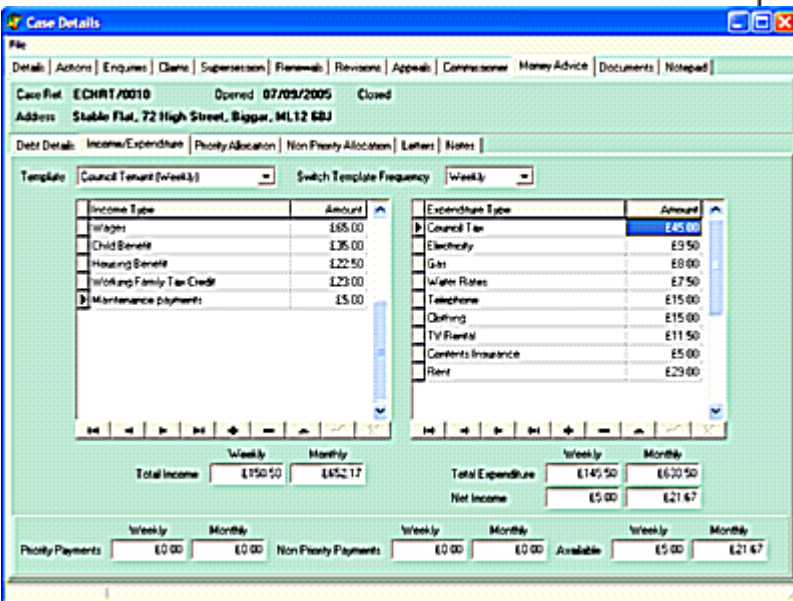
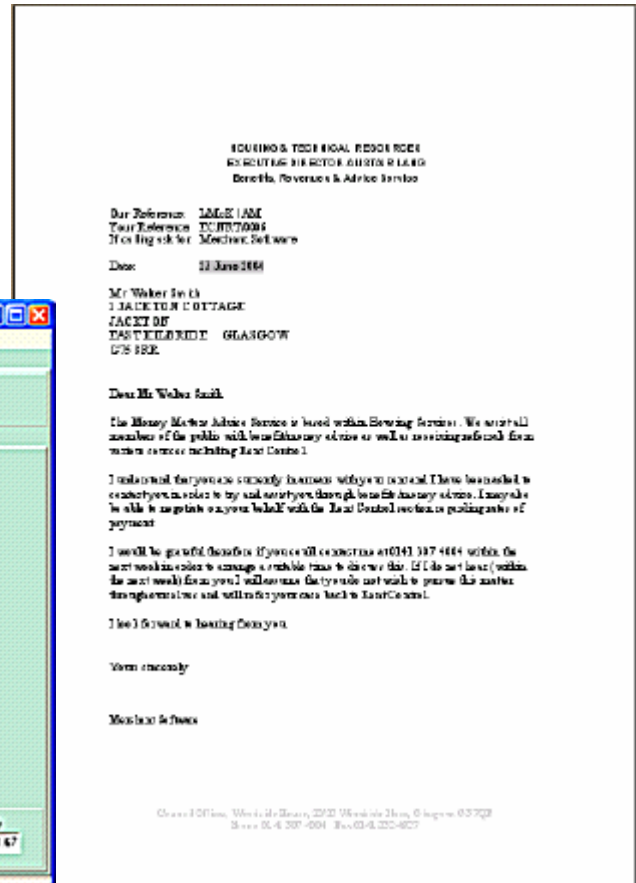
Money Advice

WRCM includes, as standard, comprehensive Money Advice support. For each case debts can be recorded, income / expenditure assessed, based on standardised

Document Production

Case management provides the facility for standard and ad-hoc letters to be generated for individual cases.

This allows standard documents to be issued quickly and efficiently, using Word, to either the debtors or any third party acting on their behalf. Each document



templates reflecting the clients circumstances, and payments allocated against priority and non priority debts. Letters, based on Word templates, can be previewed, amended to suit the specific case, if required, and then easily generated for each creditor involved. All documents generated, are retained within the document history of the case for easy retrieval and review. Statements can be easily produced in either local, or Common Financial Statement format.

Case Referral Management

With the growing level of working relationships between different agencies involved in providing support and advice to clients, the ability to efficiently refer cases, and receive feedback as to the outcome, becomes more important. WRCM provides facilities to manage referrals 'from' other organisations, either internal or external, and to monitor referrals 'to' other organisations. This approach minimises the manual effort involved in the referral process and encourages pro-active client support

generated is logged in the document history and stored in the database for easy retrieval and review.

Standard and Ad-Hoc Reporting

The system provides a number of standard reports for which selection criteria can be specified.

In addition, the underlying database can be interrogated by a number of standard windows reporting tools to enable ad-hoc enquiries and reports to be produced by internal staff.

Client Profiling

Understanding the profile of clients that make up the overall caseload is a key part of being able to analyse the issues being addressed on behalf of different socio-economic groups. WRCM allows various aspects of each clients details and circumstances to be recorded to ensure that the appropriate analysis can be provided. The information recorded includes Date of Birth, NI No, Ethnicity, Disability,

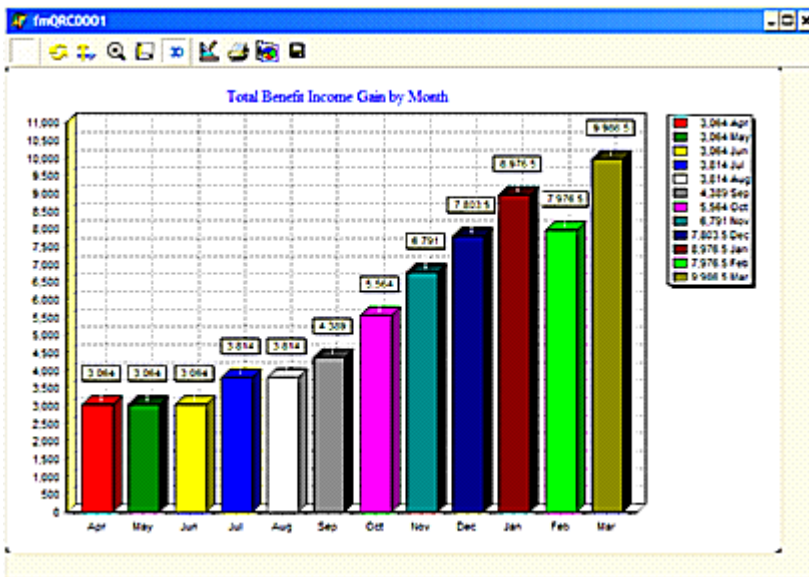
Management Information & Statistics

The information held within the system allows very comprehensive management reporting to be provided.

This is a key feature of the system as the quality and accuracy of management information about the caseload allows the necessary management decisions to be taken to improve the service to clients.

Resource / Team Reporting

With a Common Case being accessed and shared by multiple resources a key issue is to ensure that each team receives the credit due for the case work they have undertaken. WRCM identifies which team is responsible for the different elements of each case and ensures that the credit for the outcome achieved is assigned appropriately.



Security Management

The information managed by WRCM is very sensitive and it is vital that access is controlled in an appropriate manner. The WRCM Security Module provides very fine grained control over the access each user is allowed to each part of the system.

Each user's access to each part of the system can be defined by individual Menu, Form, Form Tab, Form Button, Report etc. Users can be given "Update Access", "Read Only Access" or "No Access" to each system element.

Platform / System Environment

Corporate Arrears Recovery is a thin client application which runs on a wide range of hardware platforms. The client application can be installed on PC's operating under Windows 95/98/Me/NT and Windows XP.

The application server and update process both run as services on a Windows NT/2000/2003 server. The underlying database server is SQL Server which would also operate on a Windows NT/2000/2003 server.

The system can be used by small independent groups and is easily scalable for use by large and distributed teams of users in either one or more Resources or Agencies.

System Integration

The WRCM system can be easily integrated to any other Open Database Connectivity (ODBC) compliant system.

Interfaces to Other Systems

Where interfaces are required to other systems within the organisation these can be provided as an add-on facility.

Merchant Software Limited

Merchant Software Limited is an independent software company which has extensive experience of working with local authorities in the area of Money Matters, Money Advice and Welfare Rights.

The approach which the company has adopted is to work in partnership with clients in order to build a long term relationship which will mutually benefit each organisation.

The company's experienced staff will be happy to ensure that all aspects of the installation, commissioning and after sales support are handled to the clients satisfaction.

Merchant Software Limited is TickIT accredited.

Future Developments

It is the intention of Merchant Software Limited that the functionality of the system will continue to be enhanced by the development of additional facilities.

Merchant Software Limited would welcome any input and suggestions from interested users.

Product Information

Details of the Welfare Rights Case Management System, and our other products, can be found on our web site www.merchantsoftware.co.uk

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Whilst Merchant Software Limited have gone to considerable lengths to ensure the information presented in this brochure is accurate, constant development of the product will mean that the specification and format are liable to change. If you require specific information regarding the Corporate Arrears Recovery system then please contact us for the latest information.

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