

Project Description and Objectives

Review of the financial pathway underpinning the adult customer journey.

The focus of the Financial Systems Review project was to gain a better understanding of the increasing number of issues and business inefficiencies created by the use of lengthy business processes and in some instances out-dated and, poorly integrated IT systems/functionality that do not wholly support the modern business and personalised approaches of adult social care.

Project Objectives

The overall aim therefore was to review, with learning from best practice in other authorities, the overall financial processes linked to the commissioning, paying and charging for social care services with a bid to introduce improved processes and underpinning modern IT systems.

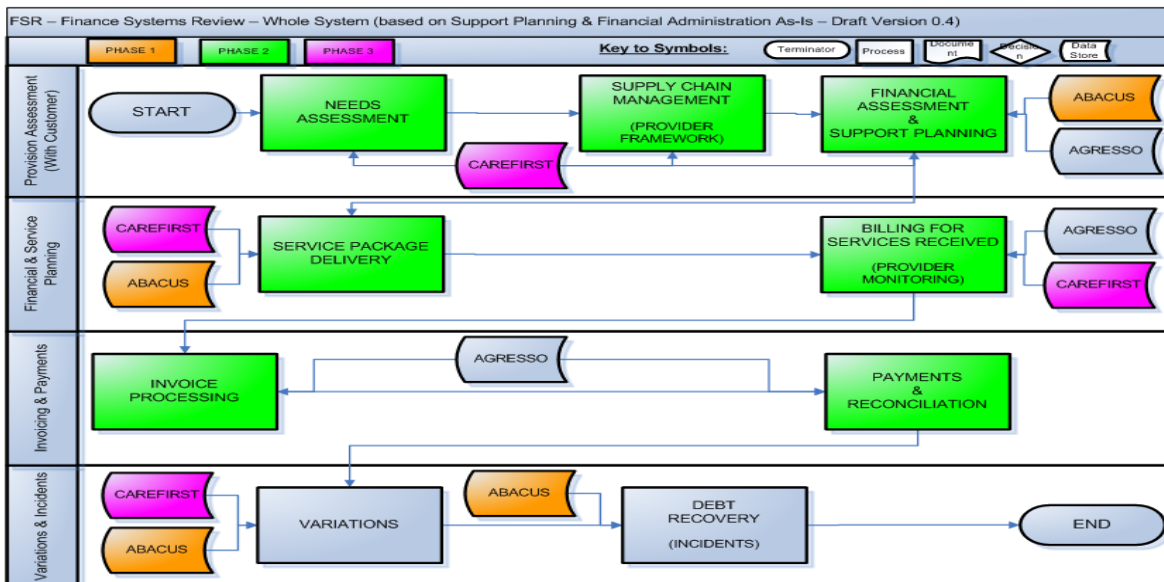
Expected Outcomes

- Consider further options for making personal budget payments available to customers
- Introduce more flexible ways for customers to make financial contributions
- Review current provider invoicing process to introduce more efficient and paperless ways to view, understand & query
- Introduce more efficient and paperless ways to view, understand & query customer charges
- Develop processes and systems that enable harmonised community charges
- Remove areas of non-value, waste and duplication from the process in which AHCS commission, pay, financially assess and charge for social care services
- Minimise the administration and any wasteful or duplicated processes
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How we Delivered

Understanding the financial pathway.

- We interviewed managers and staff at all levels to acquire the information necessary to document the process and its supporting systems. The following is a depiction of the business process with the Financial Systems Architecture.



Outputs

- Managed the project which involved changing the approach and deliverables so they were achievable in the timescales
- Business processes and systems in the financial pathway were modelled
- Evidence base was developed containing issues and product analysis
- A roadmap for restructuring the project created
- Briefing paper presented for authorisation to proceed with changes to both the scope and phasing of the next stages of the project

Results and Outcomes

The Outcome.

- Organisation has a “Whole Systems” view of the financial processes and systems which up to this point had not been produced before and showed a more holistic view of the potential changes required to improve the pathway
- Moved forward a project which has been shelved on numerous occasions
- Has in place a roadmap for future development of the process and supporting systems.

The Opportunity.

- Organisation more aware of the changes it needs to explore to support service changes like “Personalisation”
- Moved forward a project which has been postponed on numerous occasions during the past five years

Technology Opportunities:

- Introduce seamless, automatic, integrated systems
- Reduce the number of manual IT related processes and replace them with automatic workflows.
- Introduce more modern methods negating the need to use older methods such as faxing or posting

Stakeholders.

Primary.

1. Business Managers, DLT
2. SCS, SDS staff & budget holders
3. Financial management staff
4. WCC customer service staff
5. Corporate finance systems staff (including Benefits Advice and Income Control Team)
6. Strategic Commissioning Staff

Strategic.

1. Including staff from:
2. AHCS IT systems, support & Information Security
3. Corporate IT systems
4. Risk Management and Audit
5. Law & Governance
6. Business Intelligence staff
7. Information Governance staff

- Skills employed: Business Analysis, Project Management

End of Case Study.