

# CASE STUDY

## WIGAN METROPOLITAN BOROUGH COUNCIL

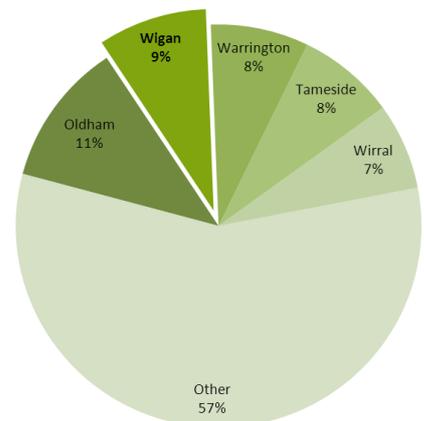
Wigan MBC is located in North West England and has a population of 319,690. The Council has once again been nominated for one of the most prestigious prizes in local government - the "Best Achieving Council" prize at the annual MJ Awards.

### Universal Credit Pathfinders

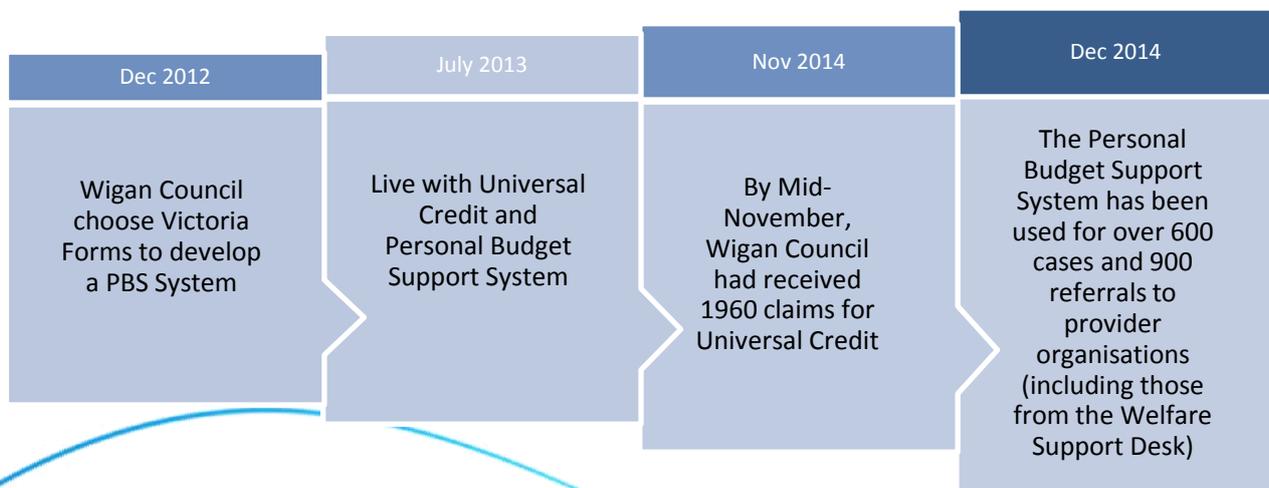
Ahead of the launch of Universal Credit on 1st July 2013, Wigan Metropolitan Borough Council was the second of four Universal Credit pathfinders for the North West, and was selected by the Department for Work and Pensions (DWP) Universal Credit team to develop a system and accompanying processes to deal with Personal Budget Support (PBS) cases.

As a longstanding customer of Victoria Forms' innovative electronic forms technology - simplifying their claims process since 2009, Wigan Metropolitan Borough Council selected Victoria Forms in December 2012 as a partner to develop a PBS system. The new system would be designed to assist the Council with managing Personal Budget Support Cases online, and would complement the existing online services provided by the Council, including 14 of Victoria Forms' eForms for Revenues and Benefits.

As of 13th November 2014, 42 Councils were live with Universal Credit, with a total of 22,900 cases started on the Universal Credit caseload (those who had applied, attended the initial interview, and accepted claimant commitment). Of these new cases, 1,990 (9%) of these were processed by Wigan Metropolitan Borough Council making them the **second most active pathfinder in the UK**, and a natural collaborator for the development of a Personal Budget Support System.



### Project Progression



## Personal Budget Support System

Victoria Forms Personal Budget Support System makes managing cases and sending referrals to provider organisations easy.

All cases within the system can be accessed from a single 'Case Management' page – where they can be searched and organised into categories; New, Ongoing and Completed. Individual cases in greater detail can be seen on a single screen, with further links to view any referrals and the complete case history.

Provider organisations are notified of any new cases referred to them via email, they can then view the case details by logging into the system. There is one login page for all users, and users are directed to the correct sections of the system depending on their user type, whether that be; DWP user, Provider Organisation user, or a Council Member of Staff. If they decide to accept the case, they can provide further details of how they intend to help the client. Service Providers can report on the progress of each; this record proves useful for both the Provider and the Council for tracking what is happening with each case. Wigan Metropolitan Borough Council currently has nine different provider organisations set up and using the Personal Budget Support System, offering 17 different referral services altogether.

## Adaptable Software

In order to fully test, develop and make the most of the system, Wigan Metropolitan Borough Council have extended the use of the Personal Budget Support system to include their Welfare Support Desk, widening the scope of the system to managing cases for those requiring money advice but who have not come through the Universal Credit route. The system is therefore able to manage any type of money advice case.

This has allowed Wigan Metropolitan Borough Council to build up a profile of those who may require support and while at the moment these people may be in receipt of legacy benefit, the Council can now prepare for when controlled migration of certain groups onto Universal Credit takes place, as the roll out of Universal Credit continues across the UK.

The system has been developed, tested, and improved with Wigan over the last two years, and is now available to any Local Authority taking on a the role of assisting Universal Credit claimants, where national expansion of Universal Credit is taking place from February 2015.



*“ The system is quick and easy to make a referral. The system is really useful to be able to see the updates to let us know what has happened once the referral reaches the provider e.g. what was provided, whether they attended their appointment, any follow up actions and information which helps us to carry out an informed decision on any future referrals if they make a return visit. ”*

Joanne Rooney  
Team Leader, Universal Credit, Wigan Council

## System Benefits and Savings

- Designed in collaboration with DWP PBS team – so the system meets *their* specification
- Tracks and processes all PBS cases in one place, which can be accessed by Council Staff, Providers and the DWP
- Meets all requirements of the DWP for reporting/auditing on service provision
- Continued progression and improvement of the system through ongoing use
- Quick and easy referrals to third party providing organisations
- Referrals and their outcomes can be tracked easily
- Eliminates the need for paper/telephone/email contact to be made with providers, allowing a much more professional and efficient service
- Allows users to see who the customer has previously been referred to and whether the referral is ongoing or completed

## Customer Feedback Report

With the launch of Universal Credit and our Personal Budget Support System in 2013, Wigan Metropolitan Borough Council began using a system incorporated feedback report to research their customers experience with the Personal Budget Support services and courses they received from the Council and the Provider(s) they were referred to. This feedback report can be completed by the customer themselves, or by a member of staff at the Council, via face to face interviews or over the phone.

100% of those who completed a feedback report agreed that the advice they received made them feel more confident about managing their money and paying their bills, as well as now feeling capable of managing their money on a monthly basis.

The answers are regularly analysed so that suggested improvements to the service and eForms can be made.

## Next Steps

One major benefit of the Personal Budget Support system is that it is continuously being changed and advanced as Universal Credit itself progresses. The next stage will be to automate this case-creation process so that data can be received direct from the DWP, in the same way that data is sent to Local Authorities in the ATLAS project.