

A photograph of two women in an office setting. One woman, with long brown hair and wearing a light blue cable-knit sweater, is smiling and looking towards the other woman. The second woman, seen from the back/side, is wearing glasses and a white top. They appear to be in a collaborative work environment.

One Revenues and Benefits

## Financial Assessments

Capita's Financial Assessments solution is designed to fully support any assessment and charging process operated by local authorities (LA) to determine an individual's contribution to care and support services, based on the requirements set out in the 2014 Care Act.

This intuitive and functionally rich solution has been designed jointly with local authority partners and integrates directly with One Revenues and Benefits to provide effective and efficient working.

With comprehensive parameters at the heart of the system, this flexible solution can accurately determine an individual's contribution to care and support services.

This software will ensure that your service users are fairly and consistently assessed. Where a Housing Benefit (HB) or Council Tax Support (CTS) claim exists for a non-residential service user, information is pre-populated into the Financial Assessment case from claim data to save time and improve data accuracy.

### The key benefits

- Ensure your customers are properly and fairly assessed in a consistent manner
- Manage your processes more efficiently and cut down on duplication through pre-populated data from existing HB or CTS claims
- Automated end-of-year uprating means charges are calculated and notified to customers at the right time, with no necessity for manual recalculation
- Share information effectively and securely to help inform various local schemes
- Data population from existing claims also reduces input time and keying error
- Provides a single process to determine CTS, HB and Financial Assessment claims
- Increase revenue through speedier processing of assessments
- Automated Changes in Circumstances, including those from the Department for Work and Pensions (ATLAS) where an HB/CTS claim also exists.

Interested in finding out more?

✉ Email us at [cssenquiries@capita.co.uk](mailto:cssenquiries@capita.co.uk)

## Functionality includes:

- Single record of household and income used across all assessments
- Pre-populated data from HB/CTS claims
- Capability to include pre-populated service charges direct from your social care system
- Inbuilt notification generation
- Utilisation of existing and proven payment and overpayment functionalities
- Dedicated privileges to ensure users are unable to access information unless authorised
- Customisable parameters configurable to your local policy and rules
- Reporting capability around caseload numbers and breakdown of financial analysis
- Full audit trail.

## Key features

### Single record of Household and Income

Using existing claim functionality means that household and income for all case types are held in a single location. Populates core household and income tables which are used by End of Year, eChange-in-Circumstances and ATLAS updates.

### Integrated Desktop

Includes an Application tab displaying the key Financial Assessment details to the assessor and providing essential user actions directly from the desktop, all subject to dedicated security permissions.

### Financial Assessment Parameters

Held under separate tabs and linked to Residential and Non-Residential Care. Includes Local Scheme option. All parameters are optional enabling true local configuration.

### Financial Parameters

Budget Codes, Service Charges and Expenditure Types enable you to fully configure all expenditure and costs that feed into the assessment.

### Application Search

Using the existing functionality of the generic search, as well as a dedicated Financial Assessment search, provides information on the status of a Financial Assessment application.

### Create Financial Assessment

Similarity to the Housing Benefit claim framework provides ease of use, and includes links to Council Tax and ability to create Creditor Reference.

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