



ORIGIN case

Case management
and single point referral
system for councils

“Origin Case allows us to develop forms, integrate partners, and bring all of the service’s work into one place which has made a big difference to the efficiency of our work.”

Camden Borough Council



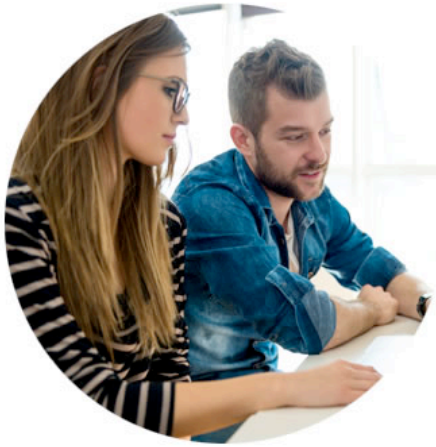
Origin Case is a web-based single point referral and case management system.

With it's efficient workflow, speed, flexibility, and ease-of-use Origin Case has helped Islington Energy Advice to dramatically increase the number of people they are able to help.

The team have managed the following growth:

During a 5 year period an overall rise of **600%** in the number of calls processed each year.

During a 6 year period an overall rise of **700%** in the number of cases processed each year.



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1. INTRODUCTION

What is Origin Case?

Origin Case is a web-based single point referral and case management system. From a single setup a large number of public health, energy efficiency, housing, debt and benefit services can be managed and delivered. It has been developed in close collaboration with innovative council clients including the award winning **Islington Energy Advice** team. In addition to helping shape the development of the system **IEA** staff are also available to provide support, training and project advice to clients using Origin Case.

The system has been specifically developed for council teams but works for any organisation that collects, organises, and shares resident case data with partners and external agencies. It is currently used by a number of London councils including **Islington, Camden, Hackney, Haringey, Lewisham** and **Ealing** amongst others. Charity users include **Groundwork, WHARF** and partners include the **NHS, Thames Water, UK Power Networks, Age Concern, E.ON**, plus multiple housing trusts, other businesses and council services.

Typical schemes range from measures to tackle fuel poverty, home energy efficiency improvements and grants, fall prevention for the elderly, debt management, mental health initiatives and 'stop smoking' campaigns. Origin Case is both flexible and highly adaptable so it can be used in many different ways.

How it Works

The system can run any number of projects.

Referrals in come from many sources (for example, GPs, health visitors, housing associations, community groups, resident self-referrals...etc). The referrals appear directly on to the system (with key details) as they come from online forms that are created by the admin team. Each referral is automatically assigned to the correct project. The admin team, or external partners, are also able to create new contact cases from phone enquiries and existing referral methods. Additional data can then be recorded for each contact/referral with ongoing notes and case management features if required.



Referrals out are then sent to partners to provide services and report back (for example other council departments, NHS teams, building contractors, power companies, Age UK etc.) Both the core contact cases and the outbound referrals can be managed and the delivery of services monitored. Custom reports can be generated on any aspect of the process and additional contacts can also be imported at any point into the system.

What are the advantages of using Origin Case?

Efficiency - provides a streamlined process with a single point of access for the following: referrals in, contact management by council teams, and referrals out to service partners.

Cost reductions - saves admin time and a small team can run many large projects.

Reduces service delivery time - increased efficiency all round leads to a faster service for clients.

One system, many projects - admin can set up new schemes and run multiple projects.

Simplicity - the system is easy to use for both the admin team and partners.

Future facing - enables multi-agency working and the coordination of services in the community.

Costs and getting started

How much does it cost?

Origin Case is based on an annual license fee. Pricing depends on the number of core admin users, and also how many external users, partners and agencies are involved. Our pricing structure is designed to allow everyone from the smallest teams to large scale organisations to use the system.

Getting started

We can set up a demo system for your organisation. You'll get a better idea of how effective the system can be if we use a few actual examples of data collection, management and referrals from your projects (without using any personal contact data). We're happy to do this without any obligation. If Origin Case is the right solution for you before going live we'll provide a test system to practice and experiment with.



2. ISLINGTON SUPPORT AND TRAINING

Alongside the Origin Case system there is also the option of **support, training and consultancy** from the multi-award winning **Islington Energy Advice** team. All services are available on a one-to-one, group, or telephone basis.

With a wealth of knowledge, skills and understanding, Islington Energy Advice has 25 years of unique local authority experience. Many of the advice services running in London are managed or supported by the Islington Energy Advice Team.

One of the teams in Islington that used Origin Case is the Seasonal Health and Affordable Warmth (SHAW) team. The SHAW team are responsible for The Seasonal Health Intervention Network (**SHINE**) a first of its kind single point referral system offering advice and service support for residents. Over **200 organisations** refer in to the system and interventions and advice include health, energy efficiency, general housing quality, income, social isolation, fuel debt and much more. SHINE was recently recognised at the **Ashden Awards** for its work around Fuel Poverty, winning the category.

Islington Energy Services Advice support & training for Origin Case

- Effective set up of users, projects, partners and services on the system.
- Training on system use (and advice on running projects if required).
- Support and advice on working productively with service providers and partners.
- Ongoing support.

Advice on fuel poverty reduction and community services projects

- Setup of new projects using the Origin Case system to identify fuel poverty and trigger a series of support interventions.
- Development of existing projects designed to maximise efficiency and effectiveness.
- Advice on the establishment of energy partnerships and delivery companies.
- Advice on how to interpret national and regional energy policy/strategy to maximise opportunity and ensure that financing options are comprehensively explored.



3. TESTIMONIALS

We moved from an inflexible, out-of-date IT system to Origin Case that allowed us to change and develop forms ourselves, integrate partners and bring all of the service's work into one place which has made a big difference to the efficiency of our work.

Wish Plus Team / Camden Borough Council

Origin Case gives us a streamlined process for referring our vulnerable residents to much needed services. It is very flexible and easy to adapt to new projects.

Energy Advice Team / Islington Borough Council

Origin Case is easy to use and allows us to provide quick and reliable referrals to our partners. It is a great time saver and tracks all referrals which provides valuable information for reporting and monitoring.

Smart Homes / Haringey Borough Council

Origin Case has allowed Groundwork London to easily create forms, collect information, run reports and make referrals all on one system. Being able to create and edit our own forms hassle free has helped us to expand the scope of our Green Doctor service.

Groundwork / London

4. EXAMPLES

The following projects are all run on the Origin Case system delivering services to the community. All the relevant information relating to a resident and project is recorded and the admin team can choose what information to pass on to service partners. Many of the schemes run from a single screen / form allowing the advisor to generate multiple referrals for services in a single, efficient session with the resident.

In tandem with these headline schemes council teams also manage many other projects on the same system & setup. These smaller projects deal with a range of services from priority services registers for utilities companies to mental health, disability action, stop smoking and fire safety checks.



Islington & Hackney Borough Councils / SHINE

The London Borough of Islington's Seasonal Health Intervention Network (SHINE) is a first of its kind single point referral system. Over **200 organisations** refer clients into the team who then make contact and assess the client for around 30 possible interventions helping people with health, energy efficiency, general housing quality, income, social isolation and much more. The team also offers support with fuel debt, assisting residents with trust fund applications and negotiating payment plans with energy companies. SHINE was recently recognised at the **Ashden Awards** for its work around Fuel Poverty, winning the category. With residents saving an average of **£200** each on annual fuel bills, SHINE is also easing the pressure on local health budgets.

Interventions include:

- Advice on saving energy and grants available for heating and insulation
- Support with bills and energy debt
- 'Energy Doctor in the Home' home visiting service
- Benefit checks (by the Welfare Rights Team)
- Falls Assessments / Telecare applications / Befriending services (other teams/councils)
- Fire Safety Checks (London Fire Brigade) / Home Security Checks (Police)
- Air quality alerts for those with respiratory diseases (from airTEXT)
- Handyperson Service

Origin Case enables teams to achieve more and grow services

The Origin Case system gives Islington the **flexibility** and **ease-of-use** they require to manage a large number of separate projects (including SHINE) with one team of advisors, on a single system. Origin Case provided a solution to the problem of multiple processes and applications resulting in a system where all projects are now in one place with referrals and feedback and external partners coordinated.

New projects can be set up instantly by the team and changes in government policy, grants and reporting requirements are easily handled in-house. As the system is so fast it allows the team to search and manage 10,000s of records easily. As a result the number of cases the team are able to process each year has risen by a factor of **700%** in the last 6 years.



Camden Borough Council / WISH +

The **WISH+** referral hub is a way for Camden residents to get access to a range of 'Warmth, Income, Safety and Health' services. The service supports vulnerable residents as well as giving others a way to improve their health and wellbeing. WISH+ puts people in touch with the services they need after discussing these with them first.

Services include:

- energy efficiency improvements
- energy advice
- debt advice
- benefits advice
- home improvements
- fire safety and security checks
- stop smoking advice
- cardiovascular checks
- many further services for parents with small children, the elderly, disabled and vulnerable residents.

Origin Case increases efficiency and reduces service delivery time

Origin Case provides Camden with a system that allows them to make their process **more efficient**, bringing all data and referral management into one place. As a consequence of being easy-to-use for both council advisors and service partners, the delivery times for services have been significantly reduced.

Origin Case allows Camden to make a **large number of referrals** from just one project form. As all questions are editable the system adapts easily to any changes the Camden team require. The system also allows external partners to process cases securely under Camden control. Origin Case enables referrals in to the system to come from online forms filled in by GPs, social workers, housing associations etc. and these go directly on to the system saving significant time.



Lewisham Borough Council / WHHP

The WHHP scheme helps people identified as vulnerable to the cold and at risk of fuel poverty to stay warm and healthy during the colder months. Referrals to the scheme come from those who are concerned about a neighbour or relative, or from health professionals dealing with vulnerable groups.

The Warm Homes Healthy People scheme provides support packages to those most in need. The scheme promotes wellbeing and reduces hospital admissions and seasonal deaths through early intervention fuel poverty measures. A referral to the scheme will provide the person referred with a free winter support package including:

- stay warm pack
- home visit from an energy advisor
- advice on how to keep warm
- 1-2-1 advice on switching tariffs
- fuel debt advice
- grants for heating improvements
- insulation and draught proofing
- emergency heating repairs
- handyperson service
- community connections service
- befriending service

Origin Case enables teams to run multiple projects effectively

The Lewisham WHHP scheme is covered by the **Groundwork Green Doctor** project. Origin Case allows any number of these types of schemes to be set up on one system. The advice team can add new projects easily and this has led to an expansion of the services provided. Advisors have a single point of access and a **consistent process** to manage all projects. Likewise reporting is all in one place and comprehensive data from single or multiple projects can be produced. Referrals in to the system come from online forms and these activate the relevant project and details, creating a case ready for the advisor to start working on immediately. This feature saves the team **valuable time** and significantly extends the reach of each project.



Ealing Borough Council / COSIE

Residents who are concerned about keeping their homes warm during the winter can call in to Ealing Council's Cold Weather Support in Ealing (COSIE) helpline. Any Ealing resident can make a free call to COSIE and receive tips and information on how to keep their home warm and how to keep energy bills down too.

Some residents may also qualify for a free home visit by a 'Green Doctor' who offers tailored energy advice and support. Energy saving measures such as draught-proofing, low energy light bulbs and reflective radiator panels may also be offered. Additional support is available for those who are struggling to pay their energy bills.

Although anyone can contact COSIE, residents are more likely to be eligible for a home visit if they're either aged 65 or older, are on qualifying benefits, have children under the age of five, or have a disability or specific long-term chronic health condition.

Origin Case works on the move with projects that are easy to update

Advisors on the COSIE scheme are able to visit residents and to record data on **iPads** using Origin Case. During these visits advisors are also able to create referrals to service partners and feed all of this data into one central system. As the system is so **flexible** the team have been able to refine their approach and adapt the questions/data involved: this makes projects more relevant and allows them to have greater impact. In addition, the ability to monitor and track the progress of referrals makes the process more effective in terms of delivering services.



Wandsworth Borough Council / WHARF

WHARF is a Community Interest Company that provides guidance to vulnerable, older, and disabled people and helps them access services. Often it does this indirectly by supporting other service providers that help enable people to live healthily and independently in safe, secure, warm and accessible homes of their choice.

WHARF is made up of **service providers** that carry out housing adaptations and repairs as well as providing other services to people in Wandsworth. The members of the forum all play a role in identifying vulnerable residents and finding them appropriate support, such as:

- Helping find energy efficiency funding
- Providing hand rails in someone's house
- Advice about fire safety
- Advice about home security
- Assistance with issues concerning heating failure and boiler checks
- Providing grab or mopstick rails in someone's home
- Providing radiator foils or bleeding inefficient radiators
- Provide adequate access to a property such as a ramp with galvanised rails
- Assistance changing energy providers
- Fitting fire safety precautions around the home
- Befriending service

Origin Case keeps things simple with great flexibility

The WHARF team moved from long paper forms and spreadsheets to the Origin Case system where **online forms** now create **pre-populated** client cases. The WHARF team are able to work effectively with **easy management** of projects, services, partners and the coordination of referrals. Partners also benefit from a system that is easy-to-use, allows them to export their referrals, and keeps feedback and interaction in one place. In addition WHARF make use of the **highly adaptive** reporting feature where an advisor can configure and run a comprehensive report within minutes.



Haringey Borough Council / Smart Homes

The Smart Homes project offered grants of up to £6,000 to help residents make energy saving improvements to their home. The grant was available for properties needing solid wall insulation or with cavity walls that are difficult to insulate. The scheme was open to both homeowners and landlords (or tenants with landlord consent) in Haringey, Camden, Enfield, Hackney, Islington and Waltham Forest. For residents the project involved:

1. A grant of up to £6,000

Covering up to 75% of the cost of installing energy saving home improvements.

2. A £50 subsidised Green Deal Assessment

To identify energy efficiency measures and how much energy / money could be saved.

3. Dedicated support

Access to an independent Advice Line and a Smart Homes Advisor who can support the householder through the process and offer assistance.

4. Help to get the most grant money available

Help to get the most grant money available through other grant schemes.

5. A warmer, greener, better home

Solid wall insulation can significantly reduce heat loss, save money on energy bills, and benefit the environment by reducing carbon emissions.

Origin Case is very quick to setup and cost-effective

Haringey required an established contact management and referral system, and one that was ready to go, to run the Smart Homes project. Turnaround times to begin were very tight but the Origin Case system was set up well within the project start date. The council also wanted a **cost-effective** solution which Origin Case provided. In addition, as the system is **highly configurable** and quick to setup, the advice team were able to get straight to work and then adapt to project changes as the scheme moved forward.



5. TYPICAL PROJECTS / SCHEMES

Energy Efficiency

Green Deal project...and similar / replacement projects
Energy Doctor...and many other projects to reduce energy consumption/bills in the home
Groundwork Green Doctor
Energy Advice...general energy advice and assistance to residents
Boiler Replacement schemes
Fuel Switching
Eco Grants
Fuel Debt Assistance
UK Power Networks PSR...priority services registers for utility companies
Thames Water PSR WaterSure & WaterSure Plus

NICE / Health

Fuel Poverty... (eg. SHINE / WHHP) and many other similar projects
Eye Tests for the household
Falls Assessments...for the elderly and vulnerable to help prevent falls in the home
Stop Smoking campaigns
Air Quality alerts for residents at risk
Alcohol Support...and schemes to help with addiction and substance abuse
Mental Health... projects to offer support and facilitate independent living

Housing

New Movers support
Tenancy Support
Handy Person services
Fire Safety Checks from the Fire Brigade
Home Security Checks
Heat and Condensation Checks
DFG Renovation Grants & Repairs



General

Benefit Checks and Benefit Advice
Financial Advice (eg. Islington 'Fit Money' and 'HomeSmart') and many others
Debt Advice
Disability Support and related services
Community Library deliveries to residents
Age UK Befriending
Age UK Handy person
Age UK Money Matters
Age UK General Advice Telecare
Meals on Wheels

These are just some examples of the types of project running on the system. Typically a single system will run multiple projects covering many areas of council activity.

6. CONTACT DETAILS

If you'd like to find out more about the system, and/or arrange a free demonstration and trial period, please contact us on the details below:

Origin Case

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