



## Customer Success Story:

# Hampshire County Council

### Overview

The Hampshire County Council is one of the largest non-metropolitan counties in England by population, with over 1.2 million residents. Hampshire is in the far south of England and is within one to two hours' reach of London by main-line railway and motorway links.

### Challenge

The Hampshire County Council Adult Services Department provides Occupational Therapy (OT) services to residents that require intervention. The Department experienced various challenges around providing effective OT services, including:

- Long wait times, sometimes several months, from the citizen request to the initial assessment by a qualified OT practitioner;
- Inconsistent practices across the county, including varying degrees of collaboration between departments, different operating times and varying degrees of accessibility;
- OT practitioners did not always have full and comprehensive information to create a case plan prior to the assessment visit, which sometimes resulted in additional wait times and visits to establish even simple treatment plans;
- Some clients who were capable of self-assessment still had to schedule visits with an OT expert; and
- Follow-up and intervention often involved third parties like equipment and adaptation suppliers, and collaboration often included a complex manual mix of purchase orders, work allocation, and documentation exchange between the Department and multiple third parties.

With a steadily growing case load (over 16,000 referrals given in 2006), the County knew that it had to take action to maintain an appropriate service level for residents requiring OT services.

### Highlights

### Government

#### Processes Enabled:

- Support multi-channel client services environment
- Medical case management
- Client, advisor and practitioner collaboration

#### Customer Benefits & Results:

- Reduced appointment wait times by about 50 percent
- Enabled about 50 percent of client cases to be completed by an advisor without referral to an OT practitioner, freeing practitioners to focus on more complex cases
- Improved service consistency across contact center and walk-in locations
- OT Direct won two national computing and technology awards for innovation and service

### Solution

The Department recognized that these challenges could be addressed through better intra-departmental collaboration and standardized case management. After an evaluation period the County selected the Metastorm BPM® Suite to create OT Direct, a collaborative call center and case management solution.

The OT Direct case management process begins with the first encounter between the Department and a potential client. The individual calls in to the department via a county-wide telephone number or visits an office. An advisor asks a series of questions to establish the individual's eligibility and needs. Information about medical conditions and functional abilities is gathered up front, establishing the foundation for accurate intervention.

After this initial assessment, a number of outcomes are possible. The largest category of requests are for simple equipment, advice, or adaptations. These cases are automatically routed to and handled by trained advisors and practitioners. Some requests require the ordering of equipment and adaptations. In house suppliers have online web-based access to OT Direct via Metastorm BPM forms, enabling direct collaboration with the Department for the ordering, fulfillment, and patient- or product-specific feedback processes. Cases that are deemed to be high risk, complex, or in need of a more complete package of care are automatically referred to an OT expert to make decisions and take the necessary actions.

As the case progresses, all activities are documented and an audit trail is maintained. In addition to assessment and treatment information, the Department tracks correspondence for each case, including information received by post, e-mail, and the County's OTD Referral forms. Once assessment and treatment are complete, the case is archived electronically. Advisors and practitioners have the opportunity to comment, and the Department can audit cases to insure that the client is satisfied.

## Results

Since the initial implementation in January 2004, OT Direct has enabled the Department to transform its case management processes, resulting in real benefits to Hampshire citizens. The Department identifies the following specific benefits:

- OT appointment wait times are now approximately 50 percent shorter, and average lead times to deliver required supplies are greatly reduced as a result of the ability to automatically hand off orders directly to suppliers.
- About 50 percent of referrals are now completed directly within the Service Center using OT Direct, without further referral. Of approximately 16,000 cases in 2006, 1,684 were fast-tracked directly to suppliers, 6,330 were handled by trained advisors and practitioners without further referral and the rest were forwarded to area teams. Pre-OT Direct, all service requests were forwarded to area teams.
- OT Practitioners are freed to focus on working with patients who have more complex needs.
- Patients are empowered to self assess and receive consistent service across the county through a single point of contact.
- The County won the Best Project – Government to Citizen award in the UK Government Computing Awards contest in 2004. The County also won the National Social Care Award for Technology from the Department of Health in 2005.

In response to winning the Government to Citizen award, OT Direct Team Manager Fiona Harris commented, "Winning this award in recognition of the collaboration between practitioners, staff, and IT is a testament to the hard work and dedication of all in embracing the use of technology to enhance the quality of provision to all our service users." Jos Creese, County Council Head of IT Services, added, "It's good to see the recognition being given through this award for the way in which technology can be used to improve the quality of people's lives."

The Department has expanded OT Direct capabilities since the initial implementation, and is now piloting a dedicated advice line for professionals and a secure referral form for NHS partners

within Hampshire.

Additional, independent information about the success of the OT Direct solution is available at <http://www.socitm.gov.uk/NR/rdonlyres/8AB79F0B-A451-448E-9778-027D5DFE3D08/0/HampshireCCDirectaccesstooccupationaltherapyservices2.pdf>.

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