

## Answers to the questions from the Virtual NUG – July 3, 2020

### Q1.

When offering enhancements, you seem to have changed from bespoke to off-the-shelf. With this, you seem to have changed from an upfront development fee and then a smaller annual support charge, to a larger annual charge with no development charge. Why?

#### Answer:

*Locata has spent a lot of time thinking on this aspect of its business. In some cases, we cannot find development partners in time to get a project moving and to get over this issue we have begun spending hundreds of thousands of pounds to fuel development. This means that we can deliver value for money right to the client base direct, which also allows smaller councils access to technology they might struggle to afford up front.*

*That does not mean we have abandoned the “Dev fee and smaller support” model. You can still work that way if you want to - however those opportunities are few and far between these days and a business will not thrive on occasional business like that.*

*We would also argue that our annual charges per council are not high and we deliver customers flexibility and future proof the software while allowing councils access to configuration of the tools much more easily.*

### Q2.

When will CBL have the same look and feel of HPA2?

#### Answer:

*It will be a gradual process. It is a gargantuan project that nobody wants to pay for in its entirety. We also have a lot of clients who like it as it is. One client is insistent on the system not changing as it works fast on her system and would not like it to slow down just to look better.*

*We have some initial concerns about style over substance, speed of the service as well as time and money. This means it will come but will probably be an evolving process over time.*

### Q3.

Direct Let - When completing a direct let in CBL, is there any scope going forward to set the applicant to "Offered" rather than "Housed"?

#### Answer:

*This would be an enhancement that we are prepared to do, however it would attract a cost for development. If you or other customers would like a cost for this work, please contact your project manager.*

**Q4.**

Proof of ID and Document Upload from clients - is this available on HPA2 or just CBL please?

Answer:

*It is already available on HPA2 via the PHP as standard (<https://hpa2.helpsite.com/articles/24072-editing-the-php-messages-questions-and-tasks>). The enhancement we have added is for customers to do this via the CBL public site.*

**Q5.**

Can the slides be distributed following the presentation?

*Yes, of course*

**Q6.**

MHCLG plan to include the collection of personal identifiers gathered by local authorities to track long term health, justice and housing outcomes of all those presenting for support with housing, including rough sleepers accommodated during the covid-19 crisis. This involves the local authority sharing personally identifiable data with MHCLG through H-CLIC. Would personally identifiable data be easy to collate (and where possible exclude if clients do not consent) from the Locata system or would changes be needed?

Answer:

*This requirement was in the original MHCLG specification so provided the MHCLG hasn't changed their specification then we have this functionality. You can download the Personal data extract for H-CLIC if you go to the H-CLIC reports page, generate the report for the quarter and click the 'Personal Data' button.*

**Q7.**

Could you go over again the enhancements that allow customers to upload docs? was it CBL only?

Answer:

*It is already available on HPA2 via the PHP as standard (<https://hpa2.helpsite.com/articles/24072-editing-the-php-messages-questions-and-tasks>). The enhancement we have added is for customers to do this via the CBL public site.*

**Q8.**

Will there be the opportunity to join the new CBL development group?

Answer:

*There is not going to be a new "CBL development group" rather the current development group will expand its role to cover wider issues like CBL, HRS as well as HPA2.*

**Q9.**

You mentioned working on a Digital signature facility on HPA2, do you have estimated timescales when this is going live?

Answer:

*Currently this is still in the early stages and we are still investigating how best to integrate this into the system. We will likely have an update on progress towards the end of the summer.*

**Q10.**

Can the pipeline document be published with timelines, so we have an idea of availability?

Answer:

*This is something we do not usually do as the Pipeline is simply thoughts/ideas for the future development of Locata systems. Some of the Pipeline content never come to fruition, due to a lack of development funds, change in in housing policy, lack of importance for clients etc. Because of this, if we were to offer dates when the new system, enhancement etc. was to come about it simply creates disappointment amongst our clients if by the suggested date it was not 'live'. This is one of the reasons we always update clients on the Pipeline at our NUGs.*

**Q11.**

Not a question for everyone - more of a query from Copeland. The slide that shows the dropdown of TA for RS during COVID. Our system doesn't show this and only shows the three original options. Is there a reason for this?

Answer:

*We've checked your system and it does have the dropdown of TA for RS. You do need to scroll down. Please contact us if you need further help.*

**Q12.**

Will CBL get the drag and drop option, for loading evidence like HPA2?

Answer:

*It already has the drag and drop system for the customers on the public websites. It is not something that the current CBL back office has. This would be an enhancement that we are prepared to do, however it would attract a cost for development. If you or other customers would like a cost for this work, please contact your project manager.*

**Q13.**

When we update a case to put them into prevention or relief we don't always get to do it on the day that the duty becomes effective. If we do this a few days later, the 56 day countdown clock starts from the day we update the system and not the date that they actually started to be owed the duty. Is there a way of this being updated so that the clock can work out the days already passed so the countdown is always correct?

Answer:

*Update the due date of prevention or relief duty task, this will change the countdown clock. More help is available here <https://hpa2.helpsite.com/articles/29551-how-do-i-manage-the-56-day-counter>*

**Q14.**

GDPR download, in CBL, there is a delay of one day when you want to download all the data. Will this change to same day, like HPA2?

Answer:

*This would be an enhancement to the CBL journal to change where the attachments are saved, we are prepared to do that, however it would attract a cost for development. If you or other customers would like a cost for this work, please contact your project manager.*

**Q15.**

At HEHOC, we use document upload in PHP all the time and would like that functionality in CBL

Answer:

*This would require HEHOC to upgrade to their public website as well as delivering a number of other improvements. We are prepared to do that, however it would attract a cost for the development. If you would like a cost for the work, please contact your project manager.*

**Q16.**

Is there a manual for document upload facilities for me to distribute to all our officer who are assessing and validation LOCATA applications?

Answer:

*This is currently in production for the HELP site*

**Q17.**

Does the uploading of docs on Locata ensure they are accessible and easy to read - we often get applicants email us with files that expire or we can't open or are unable to read etc. I wonder if we can ask our applicants to only send us their documents through Locata so we can read them and they don't expire.

Answer:

*The document upload functionality restricts the type of document an applicant can upload so they can't upload documents in a format that expires.*

**Q18.**

Any further news on the availability of the Tenancy Journal in TA module?

Answer:

*We are working on our rent accounting functionality which will include a rent account journal. So, a journal that's held against the tenancy.*

**Q19.**

Is one of the enhancements going to include an alert for cases over 56 days, instead of showing overdue tasks.

Answer:

*No, its currently not on our list of enhancements. It would be an enhancement that we are prepared to do, however it would attract a cost for development. If you or other customers would like a cost for this work, please contact your project manager.*

**Q20.**

When documents are uploaded via the PHP can you add an email alert to the case officer? Or have an alert if a journal note is added to your case, in the same way you get an alert if somebody assigns you a case?

Answer:

*This would be an enhancement that we are prepared to do, however it would attract a cost for development. If you or other customers would like a cost for this work, please contact your project manager.*

**Q21.**

Regarding - HPA dashboard

The dashboard is very helpful for showing which stage the case is up to. Is there a way of enhancing the screen to show a priority note from the journal or be able to type a short note explaining the next step of the case? For example, "awaiting Section 21 from client"

Answer:

*Once again, this would be an enhancement that we are prepared to do, however it would attract a cost for development. If you or other customers would like a cost for this work, please contact your project manager.*

**Q22.**

Some of the HCLIC validator error have a link that take you straight to the problem - others don't. Any chance you could ensure all H-CLIC errors have a link to the problem field?

Answer:

*Please can you log this on the support site with an example case where this is happening.*

**Q23.**

Can you please provide the instructions for how documents can be uploaded within the PHP? I have not been able to see the guidance with this on the Support Centre.

Answer:

*The instruction for setting up a question in the PHP is here about 2/3rds of the way down the page or go to help and search on upload to find the link below. (<https://hpa2.helpsite.com/articles/24072-editing-the-php-messages-questions-and-tasks>)*

**Q24.**

HPA2 shows the date the work was carried out on the Details page. Could this be changed to show Date of Eligibility instead?

Answer:

*Create a Date of eligibility question and make it a summary question this will make it show on the details page.*

**Q25.**

Any reason why the Officer designation can't be included as a letter field? The field is populated as per the log-in. Saves having to change the hard-coded Officer designation each time. It would really help.

Answer:

*This is most definitely possible and a good suggestion. Please raise this with your Account Manager at Locata and we will take it from there.*

**Q26.**

Are there any plans to be able to incorporate the following into the CBL side?

- Customer able to access correspondence we have sent them via logging into their application.
- Staff able to create a 'to do' list in the back office that customers are notified of and able to view/action when they log in (a bit like the PHP tasks on HPA2 where they have to acknowledge they have read/actioned them)

Answer:

*None at the moment. These would be enhancements that we are prepared to do, however it would attract a cost for development. If you or other customers would like a cost for this work, please contact your project manager.*

**Q27.**

In CBL, is there any way for the online Change of Circumstances to have selectable options, so the clients can select their reasons for the change of circumstances? And then only have to fill in part of the form that applies to those changes. Such as change or people in the household, etc. Or let us know of new changes, such as a new medical need?

Answer:

*Other than a separate medical form, this is not something we have considered purely due to the amount of complexity it adds. We have tried to keep it simple to ensure the data integrity remains whilst still saving some time for the customers when submitting.*

**Q28.**

Will Firmstep integrations be able to work with CBL as well as HPA2?

Answer:

*Yes, it will.*

**Q29.**

Can you have a place on Locata where Freedom of Information Requests reports can be saved by colleagues so that staff from other Councils can use them and run them rather than trying to reinvent the wheel? Often the same Freedom of Information Requests are being sent to each Council but we're each trying to write reports on our own.

Answer:

*It would make sense to perhaps to create these as standard reports although it is quite difficult as each request is different. However, if you speak to us when you get one and if other councils have had the same request, we can look at how best to share that across schemes.*

**Q30.**

The HomeOption website we use is one of the older ones - will the new pre-population functionality work for us or do we need to upgrade our site?

Answer:

*This would be the suggested route mainly because the security around the older site (lin number and date of birth) is not sufficient for us to then present the customer with a copy of all their personal data. The newer version uses a username and password which is more secure. We could add this to the older site too but once you have paid for these custom enhancements to your old site you may find it is more cost effective to just go ahead with a complete upgrade. It also allows you to get the document upload included free as mentioned before.*

**Q31.**

When is the MHCLG RS enhancement going live please?

Answer:

*It is live.*

**Q32**

On repeatable tasks - can this be used across two cases? I.e. if we have a second approach which requires the same task (we have one for Court casework for example) it will pull through and we then need to overwrite data from the old case. Will this be avoided via the repeatable task functionality?

Answer:

*No, the repeatable task functionality allows you to capture the same questions more than once against the same case. Repeatable tasks do not pull data through.*



**Q33.**

HPA 2 Final duties - The cases sit on desktop awaiting completion of final duties. Is there any way that the final duties cases awaiting their final offer are not included with current case load and sit somewhere else, as they show as overdue tasks for anything up to 2 until rehoused on dashboard?

Answer:

Our Cheshire East colleagues have set up their HPA2 dashboard so that officers have three separate displays. So, for example:

- Corinne Copeland
- Corinne Copeland Advice
- Corinne Copeland Ongoing

By doing this they have been able to distinguish between those needing further casework and those where the case work is complete but awaiting an offer to be able to discharge the duty owed.

**Q34.**

If a Local Authority within our scheme adds a repeatable question within HPA2, will this amend it for the other partners in our scheme, or just solely for that Local Authority?

Answer:

*If the task type is a scheme wide task type, yes.*

**Q35. Gemma Coward**

Is there any way of seeing more detailed in the unassigned cases without taking a homeless application? We are getting a lot of referrals that state 'other' as reason for loss off acc. If this is an advice case only, we cannot change the data pre-populated without taking a full app

Answer:

*The full referral form is in the client's journal. You can also create some additional tasks and questions to sit in 'triage/advice case only'. That way you can monitor the reason for 'other' and identify any trends that you can act on. It might be for example that Offender Managers are completing referrals for their clients and routinely selecting 'other'. The information that you collect will enable you to offer them further support to complete the online line forms or refer their clients to your service.*

**Q36.**

Is there a cost to the API?

Answer:

*Yes, there will be a small implementation cost and is dependent on the direction. If you or other customers would like a cost for this work, please contact your project manager.*

**Q37.**

We have had some requests from officers about whether we are able to include a 'Smart' client search function. There are occasions where some of our support and outreach officers are made aware of certain clients and only have a name to go by which they may not have the exact spelling for. Locata will only search for clients if you know the exact spelling of names or have a case number. Is there scope for client searches to include a 'sound-a-like' option?

Answer:

*You can use wildcards to search in these cases such as smi% if you aren't sure how to spell it, so enter what you do know followed by a % sign and it will match anything starting with smi. Alternatively, you could search %ith for everything ending with ith. This is useful page for search information that serves for both CBL and HPA2 <https://hpa2.helpsite.com/articles/25410-searching-for-a-client>*

**Q38.**

Applicants can reset their own passwords, why can staff not reset their own passwords?

Answer:

*We have discussed this in the past and our main reason for not doing this is by having to request it from a manager, the manager is able to verify the staff should still have access to the system. Users can change their passwords once logged in of course clicking on the link in the top bar. We are happy to discuss if this is becoming an issue due to new remote working conditions.*

**Q39.**

If applicants upload their own documents when logging in to their CBL application, how do the council get notified of them uploading this as CBL cases do not have dedicated officers allocated to them as they do in HPA2.

Answer:

*We generally create a task which can be allocated to a shared work tray, this will generate an email which again can be to a shared inbox.*

**Q40.**

We have a number of tasks that stay open after the case has closed. Example, Deposit monitoring. Is there a way these tasks can be set to stay visible on the dashboard for the task allocated Officer? At the moment, we have to write a report to ensure we keep track of these.

Answer:

*This would be an enhancement that we are prepared to do, however it would attract a cost for development. If you or other customers would like a cost for this work, please contact your project manager.*

**Q41.**

If staff have forgotten their password can they do something though? It is very time consuming for managers so it would be good if they could do that independently.

Answer:

*We have discussed this in the past and our main reason for not doing this is by having to request it from a manager, the manager is able to verify the staff should still have access to the system. Users can change their passwords once logged in of course clicking on the link in the top bar. We are happy to discuss if this is becoming an issue due to new remote working conditions.*

**Q42.**

Can you add our email, so we get notified when further documents are loaded on to their application?

Answer:

*This would be an enhancement that we are prepared to do, however it would attract a cost for development. If you or other customers would like a cost for this work, please contact your project manager.*