

**SARTH - Action Plan December 2017**

No.	Issue/Desired Action	Priority	Individual Actions To be Completed	Owner	Outcome/Progress	Target Completion	Completed Date
1	To be able to filter shortlists to enable applicants requirements to be identified and matched to property facilities. This will reduce the number of overrides used when allocating as only applicants that require those facilities will be shortlisted. This will also enable better analysis of demand for future build programmes.	Medium	1.1	Additional attributes to be added to system to allow accurate recording of an applicants specific requirements e.g. stairlift, wetroom, level access	SP/JG	JG to confirm list of applicant attributes required and LP will test on OH and Portal	Jan-18
			1.2	Review of all existing applications and update to add relevant attributes to existing applications	JG		
			1.3	Training and amend procedures to reflect new way of recording applicant information	JG		
			1.4	Identify property attributes required to enable direct match to applicant requirements	SP/DK		
			1.5	Identify responsibility for property data capture and input into system	SA		
			1.6	Update procedures/train relevant staff to enable more streamlined shortlisting process	DK		
2	Automated integration of triage application from CRM into V14 system. This will eliminate the need for manual rekeying allowing the resources within the team to focus on service delivery.	High	2.1	Complete specification of information required to import direct into V14	JG	Scoping of work has commenced and CRM changes identified to match data. JG to send this to JS for further investigation and scoping of timescales. LP has drafted spec and JG to provide feedback so can be sent to Capita for costs/timescales	Jan-18
			2.2	Submit specification to supplier for indicative costs and timescales	SP		
			2.3	Agree works to be carried out and timescale for implementation	JG/SA/SP		
			2.4	Test system changes, staff training	JG/SP		
			2.5	Fully implement integration between CRM and Capita V14	SP		
3	Application date and category status not automatically being the same	High	3.1	Process to be reviewed and correct method of recording to be agreed	JG	At the moment these two fields have to be entered manually/separately. JG to raise with Regional Panel for clarification of desired process.	Jan-18
			3.2	Submit specification to supplier for indicative costs and timescales	SP		
			3.3	System testing	SP		
			3.4	Training and amend procedures to reflect new way of recording applicant information where required	JG		
			3.5	Fully implement automation of date match as agreed	SP		
4	System has the functionality to auto suspend an application after two unreasonable refusals - this is not currently working	High	4.1	Raise fault with supplier	SP	LP to complete some testing to see if issue can be identified/resolved. Links into wider cust band work	Feb-18
5	Portal users need to be able to upload documents relating to the application and potential offers, e.g. Pre Tenancy Assessment, Offer refusals	Medium	5.1	Submit specification to supplier for indicative costs and timescales	SP	LP to raise with Capita - will be chargeable development work	Jan-18
			5.2	Agree works to be carried out and timescale for implementation	SP/JG		
			5.3	Test system changes, staff training and update of procedures	JG		
			5.4	Fully implement	SP		
6	Capita V14 system has the functionality to auto suspend when an application does not have eligible attributes selected - this is currently not working	Medium	6.1	Raise fault with supplier	SP	Various fixes have been implemented but have not resolved the issue. LP to re-raise with Capita	Feb-18
7	When an applicant is linked to a previous homeless app it pulls through all applicants on the previous application	Medium	7.1	Raise issue with supplier	SP	Linked to previous use of homelessness module. Historical data needs to be preserved for audit reasons. LP to raise with Capita for solution	Feb-18
8	Password complexity needs changing in line with audit reports	High	8.1	Amend password complexity to ensure compliance	SP	Planned implementation for Jan 18	Jan-18
9	Requirement for more automation and work flow to reduce the need for manual intervention for SARTH process	High	9.1	Complete specification of information required to import direct into V14	JG	To be scoped after integration work completed. Need to co-ordinate with workflow for allocations.	
			9.2	Submit specification to supplier for indicative costs and timescales	SP		
			9.3	Agree works to be carried out and timescale for implementation	JG/SA/SP		
			9.4	Test system changes, staff training	JG/SP		
			9.5	Fully implement automated services	JG		
10	Glitch in system - live applicants are not showing on shortlists due to still being under offer when they are not	High	10.1	Raise issue with supplier	SP	Capita provided a fix for known examples and these have been rectified. LP to build report to identify if any other applications are affected.	Jan-18
11	System thinks users are still completing an action and they get a "Transaction still running" Users then have to log out and back in	Low	11.1	Raise fault with supplier	SP		Jan-18

12	Resolution of portal error following upgrade to V14	Medium	12.1	Raise fault with supplier	SP	Raised with Capita - LP awaiting fix from Supplier	Jan-18	
13	Portal not showing correct override reason against correct application	High	13.1	Raise fault with supplier	SP	Appears to be linked to using commas' in text. Logged with Capita as major issue. LP chasing target date for fix. Email to be sent to all other RSL's to inform to not use comma's if fix is a while away.	TBC by Capita	

SP	Steve Poole
SA	Steve Agger
JG	Jenni Griffiths
DK	Dawn Kent
LP	Lindsay Piper