Item	Action
Assistance from PCC	Contact Portsmouth City Council to see if they can provide any assistance to the team
Deputyship	Review current deputyship contract with HCC
Fees and Charges	Produce a consultation plan
Social Worker Training	Create a training plan for Social Workers
Social Worker Training	Re-introduce Appointeeship induction for new Social Workers
Social Worker Training	Review and update Appointeeship information on Staff Stuff
Social Worker Training	Need FAQ's on Care Director on how to save and label documents correctly so they can be found by everyone
Social Worker Training	Create flow charts of some of the processes to help social workers to use the correct form
Not enough info or incorrect info provided by Social Worker making it difficult for the team to identify the client	Team to trial adding a note to the top of their emails asking for client initials and CD number on all correspondance from Social Workers
Not enough info or incorrect info provided by Social Worker making it difficult for the team to identify the client	Add a note to the top of the Emergency and Extra Money request forms asking for the full client name and CD number be given on the form
Detailed figures	Provide a baseline now
Detailed figures	Provide a weekly updates to Mel
Getting post to Social Workers	Investigate if can deliver items to key points in Civic Centre rather than waiting for the SW to collect?

Contacting DWP	Where possible write to the DWP rather than phone
PIP review forms	Team to add the financial information to the form before sending it to the SW or Care Manager
Restrict times when AllPay and Emergency Money Requests can be collected from the Civic Reception	Team to add collection times to their emails
Is there a free 'post it' function in Teams	Need to find out if there is a function in TEAMS to use 'virtual' post-it notes
Annual Leave	All team members need to take annual leave but need to liaise with each other to try and ensure only one person is off at any one time.
Team Training	Team to agree who needs what training and create a rota
Review new Appointeeship applications	Reduce time spent on new applications by having a set time each week to consider them.
Review Deceased Clients and Deputyship referrals	Continue to review these clients on a Wednesday
Case Management System	Explore Business World functionality to see if it can be used as an Appointeeship case management system

Responsible person	Action by date	Current status of Action (RAG)
Vanessa Shahani, Head, Income and Expenditure & Mel Creighton Executive Director Corporate Services		
Vanessa Shahani, Head, Income and Expenditure & Paul Paskins, Head of Supplier Management		
Vanessa Shahani, Head of Income & Expenditure		
	TBC	
All	TBC	
Sandra Zebedee, Senior Project Officer	31/01/24	
TBC	TBC	
All	By 29/02/24	
All	Complete	
Sandra Zebedee, Senior Project Officer	Complete	
Vanessa Shahani, Head of Income & Expenditure	Complete	
Vanessa Shahani, Head of Income & Expenditure	Ongoing	
	31/03/24	

All	Ongoing	
All	From 24/11/23	
All	Complete & ongoing	
Sandra Zebedee, Senior Project Officer	Complete	
All	From 17/11/23	
All	From 17/11/23	
Kathryn Strange, Accounts Payable Officer & Saranjit Karir, Accounts Payable Technician	From 17/11/23	
Kathryn Strange, Accounts Payable Officer & Saranjit Karir, Accounts Payable Technician	Ongoing	
All	New action on 07/02/24	

Comments
Meeting 4th March, Portsmouth confirmed no capacity currently to take on additional clients.
Reviewed with Hayley Holden, Procurement Business Partner. Next steps dependent on end to end review.
Previously drafted at high level. Dependent on transformation resource to take forward.
To be discussed further with the team when capacity allows
To be discussed further with the team when capacity allows
11/01/24 New page published live on Staff Stuff
There are already some guidance pages on Staff Stuff in relation to Care Director, maybe this info can be added to these. Need to clarify contact to progress. **01/04/24 we need to review priority of this action due to CD being discontinued at some point**
Started
Sometimes SW only provides clients initials on correspondence which makes it hard for the team to ID the client so they need the CD number. However the SW also needs to provide the correct CD number. The team will monitor the impact of adding this info and it will be reviewed again if/when necessary
The team will monitor the impact of adding this info and it will be reviewed again if/when necessary
Yet to start

In place, working well as DWP responding by letter, saving officer time on the phone. Can take up to 40 minutes per phone call and DWP will not discuss more than one client each time.
It is hoped by the team doing this the forms will be returned quicker. The current process is to send the blank forms to social care colleagues for them to complete their information and then the team completes the financial information.
The team will also include a note that photo ID is required in order to make the collection.
Function located in TEAMS and will used as appropriate with the team going forwards
In place and ongoing.
The team are now all getting up to speed with the daily tasks. Agreed as a priority.
Booked out Tuesdays between 2pm and 4pm. Will advise colleagues in Social Care.
A report on all clients with over £23k has been run and a total of 26 will now be referred to their Care Managers with a view to them being referred to Deputyship.
Initial conversations held. Felt that not an option as not a client case management system. Instead exploring options for an appointeeship case management system.