

RAST Trader Functionality User Guide - live from 26/03/2021

Background

We have been collaborating with Civica - who provide the consumer service case management system - for the past 18 months to introduce a range of system changes.

The aim is to:

1. Reduce the number of duplicate trader records on our database
2. Improve the effectiveness of trader tracking and certificates.

We have engaged with end users from TS and our delivery centres to inform the design and development of these measures and to consider all needs.

A leaner trader database will benefit both those receiving data and advisers using the system. The project has been divided into 2 phases.

Phase 1 January 2021

- Refined Flare trader search and creation process to minimise scope for duplicates
- Improved highlighting of tracking and certificates on Flare
- Functionality to whitelist traders - preventing the creation of another record with the same name
- Restricted user role - prevents users with this role from creating new traders
- Trader clean up - refined rules for overnight trader clean up and deduplication
- New partner portal report for centres to track trader creation by users

Since the above measures went live we have seen significant reduction in new trader creation. In November and December, on average 38% of new cases created on our system also resulted in a new trader record being created. In February following the system changes the trader creation rate dropped to 27%.

This is predominantly due to our delivery centres having far greater insight into the individuals who need more support, via the new report. The system refinements also minimises the scope for the creation of duplicate records.

Phase 2 - March 26 2021

New functionality within RAST / Partner Portal:

- Ability for TS users to search for traders:
 - Add tracks or certificates to these
 - View tracks / certificates associated to other TS
 - Delete or close tracks / certificates associated to their TS
- Ability for TS users to manage their own tracks and certificates

Trader Functionality

The new functionality will only be available for users who have the new 'TrackingCertificates' permission added to their account. Requests to add the new permission need to come from the TS Business Administrator (BA) and can be requested by emailing: **operations@citizensadvice.org.uk**

The new functionality is accessed via the 'Trader' option in the top right of the screen highlighted below.



Home / Traders

Traders



Trader Search

Search for traders to see details such as tracking and certificate information.

[Search for traders](#)

[Show my recently added traders](#)



My Trader Tracks

List the Traders being tracked by Cornwall Trading Standards.

[Show tracked traders](#)

[Show active tracks](#)



My Certified Traders

List the Traders certified by Cornwall Trading Standards.

[Show certified traders](#)

[Show active certificates](#)

Trader Search -



Search for Traders

Trader Name (required)

Trader Address Contains

Trader Postcode

[Find Traders](#)


- Select this to search for existing traders on the Flare database - this can be used to search for any traders with an address, regardless of location
- Note that Trader Name is a mandatory field but 'address contains' and 'postcode' are optional.
- The search logic works on the basis of 'begins' with, so entering just Amazon for example may return 'Amazon' / 'Amazon Windows' / Amazon Bathrooms etc - if these also matched the other criteria. Putting as much detail in as possible will refine results

Trader Search Results -

- A maximum of 100 records will show, displayed in descending order, starting with the most recently created
- Any trader records with a track or certificate will have the relevant icon highlighted

Trader Search

1 matching trader record was found.

Reference	Trader Name	Address	Tracked / Certified (click to View/Add)
23204319	Mabel's Boutique	5 Tristan Road, TRURO, Cornwall, TR1 1AU	 

- It is possible to view any tracks or certificates but you will only be able view notes and delete or close those associated with your 'home' TS - see below for example:

Trader Track

Trader Reference: 23204319
Trader Name: Mabel's Boutique
Address: 5 Tristan Road, TRURO,
Cornwall, TR1 1AU

Tracking Ref: 50004964
Start Date: 01/02/2021
End Date: 01/02/2022
Notes: Please capture client email
address for all complaints
relating to this trader and refer
with commitment
Tracking Authority: Cornwall County Council
Date Raised: 05/03/2021

Close Track Today

Delete Track

- It will look like this if you view a track which is associated with another TS:



Trader Track

Trader Reference: 22107878
Trader Name: RSPCA
Address: 14A High Street, Rotherham,
S60 1PP



Tracking Ref: 50004501
Tracking Description: [REDACTED]
Start Date: 05/08/2019
End Date: 05/08/2021
Notes: [REDACTED]
Tracking Authority: Rotherham Metropolitan
Borough Council
Date Raised: 05/08/2019

[Return to Traders List](#)

- For trader records returned which have no tracks or certificates, it will be possible to add these by clicking on the dynamic link next to the trader record

Trader Search

1 matching trader record was found.

Reference	Trader Name	Address	Tracked / Certified
22870107	Poundland	10-13 Westgate Mall Kirkgate Shopping Centre, Bradford, BD1 1QR	 

- Details should be added via the add trader track / certificate screen and this information will instantly pass to Flare.

TS access and controls -

The functionality allows users to add a new track / certificate to **any** trader record - with the exception of those with no address - regardless of Trader location. The track / certificate will automatically associate to the TSID which maps to the users organisation on RAST.





So if your RAST account associates to Cornwall, any tracks or certificate applied will also associate to Cornwall, but the trader can be from any location.

If you need to add a trader track to a trader which is outside of your home area, we expect that you would consult with the trader's home area first to ensure there is no conflict.

Only users associated with Cornwall could remove or close the track, other users would just be able to view. The reverse would be true for your permissions relating to tracks / certificates associated to TS other than Cornwall.

Show my recently added traders

This will bring back any traders created in the last 30 days where the postcode maps to your local TS. The below example is from the test database and links to Cornwall TS

Reference	Trader Name	Address	Date Added	Tracked / Certified (click to view/add)
23204321	Alli's Apres Ski Bar	Flat, 1 Cadgwith House, Trelliske, TRURO, Cornwall, TR1 3GZ	05/03/2021 13:23:08	 
23204320	Mabel's Cat Grooming Parlour	6 Tristan Road, TRURO, Cornwall, TR1 1AU	05/03/2021 13:21:48	 

My Trader tracks and My Certified Traders


This functionality displays the traders being tracked by your TS. Active tracks / certificates are based on the current date being within the start and end date set up on Flare. Not active is where there is no start or end date, or today's date is not within the window.

Add a Trader Track / Certificate

You can navigate to this functionality either via the search trader option, (then clicking on the icon next to the trader record), or add trader track / certificate option.

Home / Traders


Traders



Trader Search

Search for traders to see details such as tracking and certificate information.


- [Search for traders](#)
- [Show my recently added traders](#)



My Trader Tracks

List the Traders being tracked by Cornwall Trading Standards.

- [Show tracked traders](#)
- [Show active tracks](#)
- [Add a trader track](#)



My Certified Traders

List the Traders certified by Cornwall Trading Standards.

- [Show certified traders](#)
- [Show active certificates](#)
- [Add a trader certificate](#)

Once you have selected to add a track or certificate you will be prompted to enter further details:

Add Trader Track



Start Date

End Date

Notes

Detail the specific guidance relating to a trader for the adviser including:
- Specific questions to ask / additional information to capture.
- Any action which differs from usual processes covered in RAST protocol.

Detail the specific guidance relating to a trader for the adviser

Add Track

Trader Reference: 23204320
Trader Name: Mabel's Cat Grooming Parlour
Address: 6 Tristan Road, TRURO, Cornwall, TR1 1AU

Start and end date are mandatory fields so values should be entered here. For the notes we have provided on screen guidance for the information which would be needed here. The notes are for our advisers so that they know what action is required - this needs to be clear, specific and to the point. It could include

- Specific questions to ask the client
- How do you want information to be shared - i.e. notify / refer with or without commitment
- If a referral should be made to a TS which is not the 'home' TS based on the geographical location of the trader
- Anything else which might differ from your usual RAST protocol

Existing trader tracking / certificate process

The original process for managing trader tracking is to submit details via an excel spreadsheet. This remains in place for situations where users need to add to tracking to a **significant** volume of traders.

We expect the new functionality to be used more frequently as it has the benefit of allowing users to search for specific trader records (which removes data validation requirements), changes are made in real time and users can see existing tracks and certificates already present.

Users submitting a tracking request via the excel form will be encouraged to use the new functionality if we feel this is practical based on the size of the request.