



Department
of Health &
Social Care

Adult Social Care Client Level Data Dashboard

Methodology document

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Version 6.3

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Introduction

This document outlines the methodologies (logic and data processing) used to produce the data and metrics contained within the Adult Social Care Client Level Data dashboard for local authorities.

This document includes information on:

- processing the national dataset
- processing the data specifically for the dashboard
- fields derived for the dashboard
- metrics calculated within power BI
- links to additional methodology documents and the codes on GitHub

National data processing

Local Authorities submit Client Level Data to NHS England each quarter. NHS England pseudonymise the data to remove identifying personal information, and provide DHSC access to the pseudonymised national dataset, including submission meta data and several additional, derived fields, via a secure database.

DHSC then process the national database to create main tables which are suitable for analysis. There are two types of main tables:

- single submission tables - containing data for a 12-month period
- joined submissions tables - containing data for the full reporting period to date

The figures on the dashboard are derived from these main tables. The event-based pages (requests, reviews, assessments, services, costs and data quality) are based on the latest single submission table. All other dashboard pages use the latest joined submission table.

Detailed information on how these tables are produced from national dataset and the codes are available on [GitHub](#).

Dashboard data processing

The following section outlines processing steps which have been applied to the main tables described above, specifically for the figures shown on the dashboard.

Event type pages

The dashboard contains pages by event type (requests, assessments, service users and reviews), the information on these pages is derived from the single submission main table and is therefore already deduplicated to a table of distinct events. These are then aggregated to local authority level and breakdowns calculated within PowerBI.

Costs data

Only costs associated with service events within the latest quarter are displayed on the dashboard, and not the full mandatory reporting period. This is because we expect submissions to include the latest cost information for a service. For services spanning multiple quarters using the latest cost information may misrepresent services that have undergone uplifts. In longer time we intend to develop a methodology for using multiple submissions to analyse costs over time.

Planned units per week and Cost Frequency both provide information on the frequency of a service but there are instances where the two fields don't obviously align (e.g. Cost Frequency unit type = monthly but Planned units per week = 3). In general, Cost Frequency is trusted over the Planned units per week as Planned units per week is only required for services where the unit cost occurs more frequently than weekly e.g., hourly, daily, or per session.

To simplify calculation of metrics, average weekly units have been derived from Cost Frequency when the Cost Frequency is weekly or less frequent as follows:

Cost frequency (Unit Type)	Derived weekly units
Weekly	1
Fortnightly	1/2
4-weekly	1/4
Monthly	12/52
Quarterly	4/52
Annually	1/52

When the Cost Frequency is more frequent than weekly the absolute values are taken for Planned units per week. The absolute values are also taken for Unit Cost to deal with any negative values (~2% of service records). No further attempt is made to clean the data; therefore, any erroneous costs or outliers will be included in the dashboard.

Any records without a unit cost are removed. Any records without planned units per week (actual or derived) are also removed unless the cost frequency is 'one-off'. Because of higher rates of incompleteness of costs fields in the first set of submissions, these two exclusion steps result in the costs table containing approximately 25% fewer records than the services fact table.

Data quality reporting

This page contains a completeness and validity check of each entry in each field, indicating whether each entry meets the expected data type and defined list of values. These checks align with the data quality reports provided by Arden & GEM back to local authorities (via MESH). The dashboard allows users to select whether the data field is applicable and mandatory for a given record, based on several key fields (such as client type and event type). These filters are developed in line with the CLD guidance. For example, the data quality check of the Request: Route of Access field is only applicable and mandatory when a record is a request.

ASCOF Figures

The methodologies for the ASCOF measures on the dashboard are published as a separate document on Athena and available on [AGEM's website](#) under 'Using the data'.

Publication statistics

The publication statistics page contains metrics which are either due to be published in the [Adult social care client level data, England: quarterly update](#) or they are in development and are being shared with local authorities for feedback for future inclusion in the publication. More information on the methods used to produce these statistics is available in the [background quality and methodology document](#) or on the dashboard itself.

Activity Report statistics

The CLD dashboard contains a selection of metrics from the annual Activity Report publication. The methodology for these metrics aligns with the publication and is available at [Adult social care activity report, England: 2024 to 2025 - GOV.UK](#).

Waiting times

The CLD dashboard contains experimental metrics for waiting times. The methodology for these metrics is published as a separate document available on [AGEM's website](#) under 'using the data'.

Fields derived in SQL for the dashboard

Long_Term_Service_Flag

The LTS Flag is a field added to the request, assessment and review tables. It determines whether the individual has a long term service event open at the time of the request, assessment or review start date. Please note, this is a proxy definition for a new client and does not align with the definitions used in the Activity statistics or the ASCOF measures.

Costs fields

Weeks_of_service – the number of weeks the service was open for within the reporting period. This uses the start and end dates of the event unless these fall outside of the reporting period, in which case the reporting period start and end dates are used. This step occurs after date of death has already been accounted for, as described earlier.

Cost_per_week – unit cost*planned_units_per_week, except when the cost frequency is 'one-off'. For unit costs that are less frequent than weekly, the derived weekly units are used e.g. for monthly service costing £500 per month, the cost per week will be $£500 \times 12/52 = £115.40$ per week.

Total_cost_period – the total cost for the service within the reporting period. Where cost frequency is one-off then the unit cost is taken. For all other events this is $\text{Cost_per_week} \times \text{Weeks_of_service}$.

Metrics calculated within Power BI

Number of requests received, assessments completed, and reviews completed over time

These measures are a count of the number of requests received, assessments completed, or reviews completed on a given day. For the number of requests received, this is based on the Event Start Date. For the number of assessments completed and reviews completed this is based on the Event End Date. These are aggregated up to weekly and monthly counts and displayed in the line chart visuals. For weekly reporting, any weeks at the start or end of the period which do not contain a full 7 days are not shown, to prevent the data being misrepresented.

7 day rolling average of requests received

This is only provided for requests received, and it calculates the average number of requests completed in the past 7 days, reported daily.

Number of active service users and carers

This measure counts the number of service users and carers with service events open and ongoing at a given point in time. This is determined by counting events with an Event Start Date on or before the given calendar date and an Event End Date which is either null, greater than or equal to the given calendar date. This is reported weekly by week ending.

Mean cost in period per person

This is the total reported cost in the period divided by the total number of service users. This measure is an average across all service users and costs and therefore, does not reflect the intensity of a service. For example, one user may receive 6 weeks of service whilst the majority receive a couple of days.

SQL Code

The SQL scripts which produce the data tables underpinning the CLD dashboard are publicly available on GitHub here: [DataS-DHSC/ASC-CLD-LA-Dashboard: The code used to produce the data tables underpinning the Client Level Data Dashboard for Local Authorities. \(github.com\)](https://github.com/DataS-DHSC/ASC-CLD-LA-Dashboard).

Version control

Version number	Date	Summary of changes
1.0	November 2023	Initial version
1.1	February 2024	Revised deduplication methodology for service events to include Unit Cost, Planned units per week and Cost Frequency (unit type) in the fields which identify unique events. Cost analysis revised to only include the latest quarter and not the full reporting period.
2.0	May 2024	Addition of waiting times metrics. Simplified person identifier methodology to take the NHS number (traced taken over the local authority provided number) however if missing then the local authority person identifier is used. Removed the methodology for counting requests with 'conversation' in the event description as assessments, due to an issue in the code and more work is required to better understand how these events should be analysed. Updated age bands to align with those in the published CLD statistics and they are compatible with aggregation into the '18-64' and '65+' age bands.
3.0	August 2024	Addition of 5 CLD-derived ASCOF measures.
3.1	November 2024	Updated the timeseries graphs for requests, assessments, and reviews pages to include person- and event- level aggregation.
4.0	February 2025	Updated to include more detail on the processing of single submissions. Removal of waiting times methodology whilst the metrics are being developed in response to feedback. Removal of ASCOF methodology as this is available in a separate methodology document.
5.0	March 2025	Update to include methodology information for the two publication metrics (assessments and long term support statistics) added to the dashboard.
6.0	May 2025	Updated to include information on how release 2 values are dealt with in the interim prior to the new specification becoming

		mandatory, and more information has been added on how the cleaned fields are derived.
6.1	September 2025	Updated to include information on how release 1 values are dealt with since moving to Release 2 from October 2025.
6.2	February 2026	Updated information on publication metrics to signpost to published background and methodology information.
6.3	September 2026	Removed the detailed methodology for processing the national dataset and instead signposted to the documents on GitHub which are kept up to date. Added links to the methodologies for the Activity report metrics and waiting times.