

# Plymouth Welfare Rights Forum

Warspite Room  
Council House

Friday 26<sup>th</sup> January 2007  
1.00 to 4.00pm

## IN ATTENDANCE:

Colin Trend	Chair
Anne Freeman	Secretary
Darin Halifax	PCC Social Inclusion
John Amos	Inland Revenue – Tax Credits
Cathy Curnow	PCC Housing Benefits
Sarah Woolven-Allen	Tamar Housing Society
Karen Sharpe	CAB
Sarah Peonides	DIAC
Glenn Roberts	Full Potential Advice Centre
Julie Jackson	MIND & PCAB
Donna Ryall	Plymouth MIND @ The Zone
Patrick Healy	Benefit Angels
Sally Renshaw	Working Links
Mo Rafferty	Tor Homes
Dean Smith	DIAC
Mark Poole	MAP
John Pengelly	WTCS
Claire Flower	Routeways PCT
John Williams	Plymouth Claimants Union
Val Willcocks	Plymouth Claimants Union
Stuart Toll	Devon Law Centre
Mary Hennessey	Devon Law Centre
Paula Pick	Glenbourne Money Advice
David Hay	Glenbourne Welfare Rights
Julian Barr	PATH
Les Cole	CFIS/DWP/JCP
Chris Johnson	JCP
Paul Lewis	Bristol DLA Customer Services
Susan Fulcher	PCC
Pat Newton	PCC – Welfare Rights
Jackie Millard	Westcountry Housing Association
Terry Sparks	Westcountry Housing Association

## Apologies:

Julia Slade	Lark Childrens Centre
Maggie Dolan	Broadreach
Gill Joyce	Pension Service
Caroline Ackerman	Bristol DBC/DLA

Brenda Gibbs  
Carol Crawford  
Teresa Merrett  
Ian McPherson

D&C H/Association  
Routeways/CIS  
MAP  
PCC Customer Services

## **WELCOME**

Colin welcomed all to the Forum today. Round table introductions were done. Welcome given to John Amos from Inland Revenue attending to pick up feed back regarding Tax Credits and to source an appropriate person to become the Inland Revenue rep for Tax Credits to the Forum.

## **ACCURACY OF MINUTES FROM LAST MEETING**

Matters arising: commissioner's decision states you do not necessarily need a sick note for incapacity in certain circumstances.

Top of page 4: JS should read JW.

## **MATTERS ARISING**

Page 9 – social inclusion: “will be various hot phones around the city”, John Amos clarified that this is under discussion and not definite at this stage.

Colin clarified from page 3 that it is about us doing work as much as JCP.

Page 4: VW clarified in the DWP Touchbase December 06 edition it stated for customers who are unable to use the telephones can have visits etc. DS asked if JCP in Plymouth are doing this? CJ replied no, it is a national directive but there are local working arrangements and that home visiting officers were removed and compliance officers were input instead. Visits are looked at on a case by case basis. There are local arrangements as well as national directives which may contradict each other by accounts. DH said is it about cost as well as resources? Fraud manage to do visits, CJ clarified that Fraud have their own visits. CJ said that costs may well come into the equation. The local steer is away from home visits. JB asked about those who are illiterate. CJ said that there are face-to-face officers who should be helping. LC wanted to clarify on the fraud side about visits, where health is concerned, visits are undertaken by his team for fraud work.

Page 5 – paragraph 4, NI contributions. Financial Mail article. Anne to send article out to whole mailing list. **Action Point: AF**

JB updated new WB worker at PATH. Hopefully come to next forum meeting for introductions.

## **Tax Credits Report:**

John Amos introduced himself. There are 16 service centres across the South West dealing with public enquiries. John does not have direct accountability, this lies with

the Preston office. He is a link between the 2. John is here today to listen to our issues and hopefully to work with us on problems. Colin thanked John for coming today.

AF raised the issue regarding communication difficulties. PCAB were writing on behalf of clients regarding overpayment to the Preston office and it could be up to 4 months before receiving an acknowledgement. Now the office were submitting letters then after 14-28 days, submitting a complaint in order to get an acknowledgement, this is not acceptable communication. We should not be having to make formal complaints just to get an acknowledgement from the Preston office.

John replied saying that there should be a 4 week turn around time on tax credit overpayments. John said if these problems are the norm, he would be very interested in taking this back, not necessarily about individual cases, but numbers on response delays etc.

SP also said it can take 8-10 weeks for a reply from tax credit office. John said that cases can be tracked to see where the communication problems are breaking down.

John to give AF his contact details. Whilst he cannot take on individual cases, he is very keen to find out what is the 'norm' and what is not.

DH wanted to know about authority forms. Sometimes they accept a copy, sometimes they want the original copy. John confirmed that it should always be the original authority form that is sent off to the TC office. Some individuals may allow exceptions, but it is supposed to be the original form.

JW asked what dictates it should be the original? John said that legislation dictates this.

DLC asked why can't the document be scanned into the tax credit office by the Plymouth office? John explained that there is no direct contact between the 2 offices.

MP said that it was mentioned last year for TC queries to go in person to the Plymouth office. John said that last year, the drop in service was for all queries. From April last year, now changed to appointment basis, diagnostic session when first comes in, then referred to correct office for help, so TC would be sent to telephone for TC office. Hardship cases will go through telephone for up to date situation on TC case, then put through for interview for hardship payment.

CF said she had to use the Plymouth office the other day, good service and client was helped, was not getting anywhere on the telephone. When vulnerable clients have to be accompanied, this can be difficult for advisors, when the local office is busy and the appointment is set for later in the day. The advisor cannot come back the same day as diaries are full. John said that appointments are not booked back to back and so urgent appointments are seen within a short time span. He would want to know if people were kept waiting for any length of time say over 30 mins.

CT bought up cases of domestic violence and former alcoholic partner. Clients do not want any contact with their former partners' for obvious reasons. The TCO has decided to pursue an overpayment under the joint and several liability, CT would appreciate any comments and thoughts about TCO pursuing a violent partner that can then cause further complications to the client. John said that this can be looked at on a case by case basis. Maybe an alternative route should be followed and therefore all options should be explored.

John assured that there will be continuity from the TCO with the forum.

### **Housing Benefit report:**

The current situation regarding claims awaiting processing is as follows:

Working Age-

New Applications/Change of address – 184

Pension Age -

New Applications/Change of address - 55

Total claims awaiting processing = 239

Claims pending further information

New Applications/Change of addresses – 552

The number of claims waiting processing has reduced slightly since my last reported figures. Work over the Christmas period increased due to our week's shutdown, but we are getting back on top of the work. The average number of days has shown a month on month drop and we dropped to 42 in December as opposed to 44 in October. We are moving towards setting up generic working age team, who will deal with all tenure types, rather than separate teams for rent rebate and rent allowance claims. This will give us greater flexibility in directing our resources.

Upgrade of our Document Management System – this is scheduled to take place in May 2007, with staff training taking place in March and April 2007. There may be a blip in our service over that period, but we will aim to keep any disruption to an absolute minimum.

Local Housing Allowance – National roll-out is still due to take place in April 2008. Preparation for this change will start to ramp up in June 2007. We will ensure we keep the Forum informed of the way this change will affect our service.

AF asked about the move to generic teams, systems can be complicated enough with different rules for rent allowance and rent rebate. CC confirmed that staff will be given full training in order to cover the new area of benefit.

DS asked how much DHP was last for this year. CC said that there was still an amount to be used, unsure of exact amount, but will get this information out to us asap. This info would be helpful at the March forum please. **Action Point: GE**

DS commented on would like to know how many claims are 'lost/failed' due to not meeting verification framework. JW also said that it would be useful.

DS said would be useful for update on DHP at each forum please? Anne to contact Gary and ask him to bring this information each forum. **Action Point: AF/GE**

JB passed comment on that there must be some budget left at the end of the year.

### **DLA report:**

December figures:

DLA new claims	2568
AA new claims	2723

Success rate:

DLA	54-57%
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AA	82-86%
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Outstanding work: AA taking 1 week if all information is in the claim.

There are 3373 new claims outstanding and 664 disputes/recons outstanding.

Workloads are coming down. 12 new decision makers started last month. More due to start in Feb, which will help with the caseload.

CT noted that the workloads have increased, but DM's are working harder to keep on top of it.

New member on the customer services team called Gloria. If a customer is unable to complete the claim pack, Gloria is the officer who completes the claim form over the phone.

Appointees: work is fed out to either JCP or pension service, pension service will take the lot for visits etc. DS what about when you are trying to stop somebody being an appointee? Seems to be a difficulty with JCP over this. Paul said the criteria for having an appointee means that the customer is mentally incapable of making their own decisions. If it is the customer who is deciding they want a change, this can be complicated. Local JCP should be involved and a visit arranged. Paul said that some evidence may be required to prove that the customer is either capable of managing their affairs. DH said that a consultant says they either are or are not capable of managing their affairs. DH wanted to know where the office stood legally. Paul said that this is a Secretary of State decision. It can be based on the customer's representative, or on medical evidence, basically on what evidence is

supplied to their office.

For DS point, Paul said that they would want some evidence to prove the customer can manage their own affairs. CJ said that the compliance officers would undertake these visits. CT confirmed with Paul that a GP letter would be acceptable as confirmation of managing own affairs. Paul said though if the award was given because they were unable to manage their affairs, then this could affect the award of DLA.

MP said had a problem with authority form being accepted as the words DLA were not mentioned on it. Paul said that the authority must state "in connection with my claim for benefit". This is ok for new claims and recons, but for appeals, the authority must state in relation to DLA.

AF mentioned that this had been covered during one of the Forum meetings in 2006. Caroline Ackerman had kindly provided examples of what was acceptable for authority and what was not acceptable. Perhaps we could ask Caroline for an update of examples?

JW said that what dictates that this wording is required? Paul said that doesn't think it has been a change, there has been a tightening of the existing rules. These decisions are passed down by the Director for Customer Service and External Relations. CT clarified that DPA being reviewed will also have an impact.

JW said a list of examples would be useful. Paul said this can be provided. DS said we have had this before, but useful to have it again.

Anne to email Caroline Ackerman and ask for updates on wording to be used on authority forms. **Action Point: AF obtained and in mailout.**

KS asked how many complaints have there been of info being given out to unauthorised people? Paul said those records are not kept by them. John from TCO confirmed that it is a major problem. CJ confirmed 1.5 million calls per day from debt companies trying to get information about clients. KS said that it would be useful to have this information.

CJ said about explicit consent. This can be used by agencies. CJ said email went to all staff to remind them of their personal responsibility if give out info to the wrong people.

DHx said about PIP – Personal Information Policy. We can circulate full document of 46 pages or reduced summary of 2 pages.

DS said guide been produced on challenging EMP reports etc. Discussion around the report he has.

Paul said that medical reports for IB are different to the ones produced for DLA. DS agreed.

Proposed by DS that the forum signs up to Benefits and Work.

Suggested that the Forum becomes a member of the Benefits and Work site – to be ratified by the committee. **Action Point: Committee**

### **Secretary report:**

- 5 further memberships issued since last meeting, 4 left in storage. 1 issued at the Forum:
  - Benefit Angels
  - Devon Law Centre
  - DIAC
  - Glenbourne Unit
  - MAP
  - MIND
  - Unison Welfare Plymouth Branch
  - Plym & District Disabled Fellowship
  - Plymouth CAB
  - SMART
  - The Zone
  - Trevi House
  - WTCS
  - Routeways/CIS
  - Surestart Lark Childrens Centre
  - Tor Homes
  - Routeways One Stop Advice
  - PATH
  - Full Potential Advice Centre
  - Broadreach
  - Plymouth Claimants Union
  
- No further update on SRB under spend, to be noted and carried forward. Monies still ring-fenced in the account.
  
- Big Lottery BASIS funding application. Decision due next week. Will send email around once received.
  
- Conference report not yet finished.
  
- Website now loaded, first 2 pages completed. Address is [www.plymouthwelfareforum.co.uk](http://www.plymouthwelfareforum.co.uk) feedback required for content.
  
- Constitution – defer for future meeting. Maintain current status quo. We have not yet been successful in contacting Glasgow WRF who operate similar to ourselves.

### **JCP report:**

Nearly all claims being processed within 48 hours providing all info is received with the form.

Change of circo work is behind as new claims take priority to get benefits into payment. Most COC will take 2<sup>nd</sup> place to new claims being processed. IS was a problem as they were missing urgent items to be processed, ie those things that will drastically affect entitlements.

There are now 2 variations for call backs, 3 hours or 48 hours. Every call back not made that they are aware of is passed to CJ for actioning and dealing with. IS still a problem but this is decreasing. Last week only 5 callbacks not made that they are aware of.

If you do not get your call back, please call back again and inform them that call back not received, CJ is then able to deal with this and action it properly. Needs evidence to improve the call back service. Not all staff answering the phones have been trained. Move to Old Tree Court next Wednesday for processing staff. Staff should identify themselves on the phone by giving first name. Unions support staff not giving their surnames. Letters to be addressed as they are not fit for purpose. Letters going out now going thru CJ for checking as they are not signed, or dated or have the wrong telephone numbers on it. Processors are being retrained on how to ask for further evidence and what is required and to put this in a manner that is easily understood what is required and why.

CJ trying to get processors to telephone customers to ask for further evidence first, if they cant get on the phone, then write to them.

CJ going to try to get Old Tree Court rep to come to a forum to meet us and discuss Old Tree Court and the service provided there.

CJ said about contact details. There is a national steer to consider certain voluntary organisations to have internal contact such as emails. However, security has highlighted the fact that customer's details should not be contained in an email. This is now on hold until further clarification has been received. CJ will continue to send his email replies as he has not received instruction to the contrary.

PN asked when can a customer apply for a crisis loan? CJ said an emergency payment can only be applied for after their first date of payment. So if you claim on the 1<sup>st</sup> of the month and ask for emergency payment on the 8<sup>th</sup>, you wont get it as you have not missed your first due payment date. The JCP should consider if customers should be going for emergency payment or not.

Crisis loan application cannot be claimed until the actual interview (WFI) has taken place or have submitted signed claim form if they are sick/carer. This is because no income is in payment to repay, or expected to be in payment. Do not use the term Urgent Payment as this is a completely different scheme and will cause confusion. Also, customers should be sent a compliment slip telling them that the application has been sent to the processing centre.

Discussion surrounding crisis loans and emergency payments.

DS asked about interim payments. CJ said no such thing anymore. It is now emergency payments or crisis loans. Do not use any other jargon terms as you will

confuse the processor as well as the customer.

Where the delay in payment is due to awaiting verification of a small income detail, then the processor could use the balance of probabilities test and pay a reduced amount of benefit pending verification. However, the processor must be absolutely certain that there is no doubt

DS said that is the interpretation but customers should be encouraged to take this to the reviewing inspectors as very often decisions can be overturned. CJ clarified that the process under discussion for crisis loans is for new claims only, the alignment of benefit and payment/due date is used for this. Different rules apply to existing claimants.

Discussion surrounding clients who are refused crisis loan or emergency payments and then have no source of income. Who to contact and how to make a complaint. If you phone the 0845 number and want to challenge, then ask for supervisor to call you back and tell the telephone officer that you do not agree with the decision, they should be getting a supervisor to call you back then.

Discussions surrounding reviews not minuted due to too many conversations going on. Background conversations are not only distracting but also inconsiderate for the persons around you who are trying to listen to the discussion.

SP said that advisors who work with vulnerable clients need a set of procedures/guidelines to follow – can this be provided? CJ said that he can put something together and send it to go in the mailout. **Action Point: CJ/AF**

Discussion about what evidence is reasonably required. CJ said that the responsibility is always down to the customer to provide the information. CJ also said that yes they may have to write to employers, but cannot guarantee this being done in every case.

SP said that on a positive note, they are getting through on the phones quicker, but missing some call backs as this happens in the afternoon when she is out of the office. CJ said that when it comes to ansaphones, the caller should leave a message to say they have tried to call back.

Discussion around call backs and delays in returning calls. SP said that when she has called back to say no call back received, then still no call back. This does not appear to be going through to CJ.

The phone system was discussed, insufficient number of telephone lines etc.

JW said the advice worker from Shekinah Mission went with client for 3 hours to Old Tree Court to try to get through. CJ said that this should improve once move is completed.

JW asked about the probabilities test approach. JCP frontline staff do not appear to be taking this approach. CJ said that front line staff should not be giving their opinions, they cannot refuse to send a claim form through. JW said that front line

staff are refusing to send claims through. They refuse to accept proofs of income/savings etc and tell customers that what they are provided is not good enough.

JW asked if social fund administration is coming back to Plymouth or not. CJ said no. Crisis Loan officers also due to go to Bristol in next few months. Will need to be applied for by either post or telephone. CJ said that decisions should be made within 48 hours. CT said that specific examples should be carried on outside of this meeting.

CJ said for JW to contact the customer service manager with this to discuss.

CJ said that it is not his remit to go through some of these issues raised, the new Old Tree Court manager will need to take up these issues.

SF asked at what point do JCP notify HB that there is a claim for primary benefit and CTB/HB?

DS asked if the out of hours service is still operating? CJ said as far as he is aware.

DW asked if there were some technical difficulties with IS? Lone parent waited for 4 weeks and been told there is a technical 'glitch'. Does CJ know anything about this? CJ said that he is not aware of any technical 'glitches' at present. If 2 payments had been missed, then they would have been looking at putting her onto clerical payment.

Next 5 mins not minuted as AF had to put more money on the car parking.

### **Social inclusion:**

Benefit drive in Stoke being done by Routeways/CIS for older people. Stoke are 7<sup>th</sup> on the deprivation index. Stoke GP's willing to send out mailing for this. This will be done over a week in February and will be in pubs, charity shops etc.

Council Tax mailing, allowed a list of useful numbers. List of 16 to go on the list. DH seeking permission from organisations for details to be included.

Anne been sent a copy of PIP, summary of this available and will be sent out in next mailing. New paper on employment allowance due to come out shortly (ESA).

**Action Point: AF.**

PCC website being updated with contact details and where to go to for help.

Steering group meeting twice in March to look at action plan and re-jig where needed.

Strategy and updated action plan will go out to all forum members to 'police'.

DHx still asking forum do we want city wide take up figures? DHx will use the figures that he has and these figures will be the basis for any applications that PCC needs to

make. If anybody wants to submit additional figures, please talk direct with DHx.

Ctax bills should be received 14 days before the first direct debit is deducted from bank accounts. Pension service and Age Concern will be picking up work from the Stoke Benefit drive.

WB directory – Plymouth CAB are now compiling this and they are building a database and everybody will have 2 forms sent to them to complete, public data base and private data form. CAB will now be running this. Anne to send to all forum members the forms for completing and returning. **Action Point: PCAB to supply forms.**

JW asked if it was in the City's benefit not to continue with collating figures etc? JW said if data is not being compiled, is there a point? DHx said that data is being collated, but they can only insist to have it from those they are in contract with. DS said that DHx is looking at the impact that the strategy has on Plymouth and residents.

#### **Any other business:**

DW said if you are working with young people who have a child and they want to do voluntary work, full time or part time work, there is a scheme for free childcare. Funds are paid direct to the child care provider. Please contact DW for further information.

KS said that one vacancy being advertised now and 4 due to be advertised. 1 x A.S.S., 2 x legal services workers, one FIF and one admin worker. Found to be expensive and poor value for money advertising in Herald. Will be advertising in Big Issue.

#### **Motion:**

Read motion from the Claimants Union: "The PWRP recognises the hard work of the jobcentres staff and are deeply concerned that they need to take strike action to defend their jobs and services. We hope that their action will ultimately result in a better service to our clients".

Motion is from the advice workers and not the statutory sector organisation representatives.

JW explained the reasoning behind the motion and why this has been presented. DS added that he felt that a copy should be sent to the PCS union: Mike Cooke, Mervyn Ellis, Durley House.

It was agreed by Voluntary Sector Reps only at the forum that we would send a letter of support to the PCS union reps above and the letter would state that this was from the voluntary sector reps only, in order that we do not place our statutory sector reps in any conflict of interest.

Meeting closed 4pm.