

Plymouth Welfare Rights Forum

Warspite Room
Council House

Thursday 26th March 2007
1.00 to 4.00pm

IN ATTENDANCE:

Colin Trend	Chair
Anne Freeman	Secretary
Ian MacPherson	PCC Customer Services
Gary Edwards	PCC Housing Benefits
Kevin Osbourne	D£von Pound
Maggie Dolan	Broadreach Resettlement
Brenda Gibbs	Devon & Cornwall Housing Association
Donna Ryall	Plymouth MIND @ The Zone
Alison Jane	SMART
Sandra Bryant	MAP/ SMART
Julia Slade	Lark Childrens Centre
Pip Critton	Pluss Workable
Bruce Chapman	Astor Hall
Annie Bush	HMRC – Individual Customer Unit
Scott Robertson	PATH
Julian Barr	PATH
Suzanne	IB medical reference team
Chris Johnson	JCP – Benefit Delivery (Customer Service)
Paul Lewis	Bristol DLA/DBC customer services office.

Apologies:

Caroline Ackerman	Bristol DLA office
John Pengelley	
Diane Williams	
Pat Newton	
Susan Fulcher	
Karen Sharpe	

WELCOME

Colin Welcomed all to the forum. Round table introductions were given and new attendees were welcomed. Welcome to Scott Robinson from PATH. Agenda being re-jigged to take into account some latecomers.

ACCURACY OF MINUTES FROM LAST MEETING

Minutes accepted as a true record, Diane Williams to be added onto attendance list for that meeting.

MATTERS ARISING

Any matters arising would be covered elsewhere in the Forum. CT did cover that the committee agreed to leave the constitution as it is as the moment, pending further information being received about Glasgow Forum and their rules etc.

Housing Benefit report:

DHP update –

Available spend for 2006/07 = £62,399

Projected spend to 31/03/07 = £62,399 with a possible £200 to £300 overspend

Available spend 2007/08 = 68,624

Statistics on failed claims due to the lack of proof – this is something that we do not have to report on to the DWP. Consequently we have no reporting mechanism in place to provide such statistics. I have checked the software system guide and there is no report in place that will provide information on failed claims, I will therefore have to investigate with my systems team producing an ad-hoc report.

Update -

The current situation regarding claims awaiting processing is as follows:

Working Age-

New Applications/Change of address – 355

Pension Age -

New Applications/Change of address - 67

Total claims awaiting processing = 422

Claims pending further information

New Applications/Change of addresses – 551

The number of claims waiting processing has increased significantly since my last reported figures. We are now in one of our busiest periods of the year and all claims have been updated and new entitlement letters and council tax bills are in the process of being sent. We will continue to prioritise new claims received to ensure we get claims into payment as quickly as possible.

Upgrade of our Document Management System – this is still scheduled to take place in May 2006, with staff training taking place in 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.

CT said good to see about a 10% increase in the spending of the DHP, GE had reported a £200 to £300 overspend on the allocated DHP funds for this year.

DHP update –

Available spend for 2006/07 = £62,399

Projected spend to 31/03/07 = £62,399 with a possible £200 to £300 overspend

Available spend 2007/08 = £68,624

Statistics on failed claims due to the lack of proof – this is something that we do not have to report on to the DWP. Consequently we have no reporting mechanism in place to provide such statistics. I have checked the software system guide and there is no report in place that will provide information on failed claims, I will therefore have to investigate with my systems team producing an ad-hoc report.

Update -

The current situation regarding claims awaiting processing is as follows:

Working Age-

New Applications/Change of address – 355

Pension Age -

New Applications/Change of address - 67

Total claims awaiting processing = 422

Claims pending further information

New Applications/Change of addresses – 551

The number of claims waiting processing has increased significantly since my last reported figures. We are now in one of our busiest periods of the year and all claims have been updated and new entitlement letters and council tax bills are in the process of being sent. We will continue to prioritise new claims received to ensure we get claims into payment as quickly as possible.

Upgrade of our Document Management System – this is still scheduled to take place in May 2006, with staff training taking place in 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.

Customer Services report:

Ian MacPherson gave feedback. In Jan 07, over 85,000 calls taken for Plymouth. About 15% of calls are for Revs and Bens. Phones are very busy and are trying best to answer all calls. Call backs have increased from 2-3 days to 4-5 days. IM

reminded the Forum that advisers with clients present can have an immediate call back, you just need to ask for this.

High sickness and maternity leave rate at the moment. Customer service team numbers are remaining the same and are trying to streamline the service to be efficient. Trying to streamline front services in Civic Centre, mass staff training being undertaken, let IM know if there are any problems though.

Offering call backs and alternative appointments during very busy periods etc.

CT said that 85,000 calls is a very high amount. IM said that in Apr 06 there were 65,000 calls. Generally calls have increased by 10%. CT said that immediate call backs for clients was more helpful for advisors.

IM said there are 5 different queues in the foyer, various staff cover various aspects of knowledge, all staff are being crossed changed to give information and signpost customers. Operating on a ticket number system at present as it was felt this would be most appropriate. IM said that if anybody has suggestions, then please let him know.

DW gave example of when the ticket number was flashed on booth, but not on the screen. IM said that this would have been a computer glitch.

JB said about letters some are very longwinded just to say benefit either going up or staying the same. IM said that a generic form etc is needed. CT suggested that PCC holds a list of priority groups/needs. IM said that alternatives can be provided, they are trying to keep paperwork/forms the same for everybody, but will work with individual needs where requested.

AF mentioned that PCAB are having difficulty getting through in telephone lines for HB/CTB, telephone queues are very busy and not able to even get into the queue to ask for a call back anyway. IM said that as staffing levels have been low at present, then less members of staff to deal with calls. IM has to feed this back to the management and will be saying that they are now on maximum capacity and therefore if more calls come through, reply times will decrease.

DR said about when the number is answered and it says call will be recorded, then long message which costs money to listen to only to find you cannot join the queue and you are cut off.

DLA report:

PL gave updates: 2531 new DLA and 2759 new AA claims for Jan 07. 55% success rate for DLA and 84% for AA cases.

Last forum raised the issue about disclosure to advisors and 3rd parties. Document has been circulated since the last forum.

DLA forms are changing from April 2007, longer and thicker, but more room for replies to be recorded though.

Special rules changed in 2006, benefit is awarded where life expectancy is 6 months or less and is signed by medical professional. Previously special rules was awarded for life, or also known as a unrestricted award. It was changed that a maximum award under special rules would be for 3 years.

They are now looking at how many people have been awarded benefit under special rules that are still receiving it 7 years later. They are doing a sample of cases to see where awards are being made and for what illnesses. For example, somebody who has benefit under special rules as they could die the next day – known as day by day life, then these awards will remain unchanged. However, other awards may be looked at. It used to be high care/high mob was awarded under special rules regardless of whether they had care or mobility needs or not. If they identify a customer who is considered to no longer be 'special needs' then they may be looked at under another set of criteria/heading and they may be invited to reclaim under this.

So a customer who was awarded under special rules 7 years ago, may be invited to reclaim to get an uptodate view of their circumstances, they may need to still be awarded the benefit, but not under the 6 months special rules.

CT clarified, that those over 7 years of benefit, may be invited to reapply and if still awarded under special rules, will only be for 3 years.

PL said that there may only be a very small percentage affected.

Blackpool got rid of their customer services team last December 2006. they are very keen to build relationships across the country. They have a team dealing with the south west of England and are keen to visit people. They could attend the forum if invited.

JB asked about the new DLA forms, are they still in one piece? PL confirmed still all in one form. PL said this had come up from somewhere else. It has been suggested that as much of the 'old section 1' form be completed as possible send it into the DLA office with a covering letter. Copy the form questions about care/mobility and then complete the questions on the copies and send those in at a later date.

The return of the form will register the claim as being made in time, but you need to put in covering letter with the form to explain what you are doing. PL said that the decision makes should then write out to the medical profession for their reports, and by the time you send in the question copies, the office should have a reply back from the medical side. PL said whilst this is not perfect it might help. JB said it will give some flexibility.

CT asked about the old DLA forms, PL said to still use up supplies. Old forms are still valid. Some wording has changed on the new forms.

CT asked about pdf's of the forms, can we still print these out to complete. PL said yes, these can still be used.

Jobcentre Plus

CJ introduced Suzanne from JCP PCA team. CJ said still trying to get JCP to come

along to the forum, they are meeting about coming here. DS had asked about qualifying for mortgage interest at last form. CJ said that yes, staff should be writing to clients to let them know about this. However, staff were not aware and so customers were not being informed about reapplying at the end of the 39 week qualifying period. This has now been covered and therefore staff are now being trained to cover this.

There is no criteria when somebody should apply for a crisis loan/emergency payment etc. CJ said that it is important that people should just say they have no money and need money quickly, they should then be pointed into the right application.

CJ said they are in their new building, lot of staff sickness due to building problems.

CJ said IB process on the day of receipt.

IS 242 new claims, only 4 were complete and could be processed
IB 226 new claims, 80 were complete and were put into payment within 3 days.
JSA 717 new claims with 375 ready for processing.

JSA and IB are more up to date, fewer complaints.

IS further behind, taking at least a week. Problems during February, but being sorted out now as problems and solutions are being identified.

There are on average, 6750 pieces of post per week for IB and IS and JSA coming into the offices.

Telephone calls are improving. Over 90% calls for IB and JSA are being answered. IS calls have dropped to 76%, they know insufficient staff numbers. Taking 3 times as many phone calls for IS. Some processing staff are moving to telephony service. This is to carry out minor adjustments on the telephones for things such as payment methods, rather than emails circulating around the building. During last week alone, 41 call backs were not made, CJ confirmed no excuse for this and this matter is being addressed between the team leaders and managers. CJ also aware that as he is only notified of approx half of all call backs made, it is likely that the number of call backs not returned last week was double what he is aware of. There are now 2700 calls per week coming in.

Looking at taking advice from Bristol on how they don't manage to miss any call backs and this is actually because they don't make any. CJ said that the Plymouth JCP are being held up as a good example.

From 2nd April 07, all remaining processing work from Barnstaple and Newton Abbot comes to the Plymouth office to be dealt with.

Crisis loans and living expenses only dealt with in Plymouth. Dealt with on same day if made in morning. 48 hour target however, so it could slow down in the future. For Plymouth, Tavistock and Kingsbridge, there are an average of 150 to 160 applications per week.

PCA questions:

AF asked about failing PCA

IB said that can be they failed the medical, failed to attend the medical or failed to return the IB50.

If failed the medical, then can apply for reduced rate IS and appeal. They do not need to make a new claim for IS, providing **they were already in receipt of IS**. If not on IS, then will need to make a new claim for IS.

If the other 2 points, then can only appeal but must also apply for JSA, pending appeal.

Decision makers will look at whether the decision can be changed or not, if not, goes onto Tribunal.

JB raised about people with mental health problems and Tribunals. Hard to get them to understand what process they need to do, i.e. whether to ask for reduced rate IS or claim JSA. Therefore, sometimes, customers don't claim anything and wait for their appeal hearing.

If you win appeal, then benefit is repaid to customer. If you don't win appeal, then you don't get any benefits repaid to you, even if you didn't apply for the benefit such as JSA as you didn't understand what to apply for.

BG asked about if customer supplies note from GP stating that depression is cause, but failed PCA. IB explained that don't take this into account if it is the condition that they failed their PCA on. No prior notification sent to customer stating benefit going to stop, however,

BG gave example of PCA failure and benefit stopping, customer has been passed from emergency payment to crisis loan/budgeting loan etc. CJ advised customer to ask for an emergency appointment.

With regards to backdating, this isn't taken into account for emergency payments process.

JW said about 39 week qualifying period. Is the department notifying customers that they might be entitled after the 39 week period. CJ said this was something that the department had missed and this is now being addressed. CJ said that this would be classed as misdirection under backdating requests.

JW also said about on the emergency payments – could CJ clarify this? CJ said the emergency payment is a payment of any benefit because the department cannot process the claim, perhaps because the customer has not been able to supply documents and information requested by JCP. This emergency payment replaces the interim payment.

CJ said that they have a Standard Operating Model. This covers from when

somebody first contacts us to when the claim is put into payment. The SOM takes precedence over the Guidance. CJ not overly sure where the terminology came from or who changed it. However, all staff in JCP operate by the SOM and therefore are familiar with the jargon in the SOM and not the legislation. SOM's are rigid and no flexibility for staff.

CJ said with regards to call backs, CAB's etc might have had 'special' access etc to different telephone numbers, but other organisations didn't. They are looking at whether a system can be put in place for **all** advisors working with customers and how to undertake call backs whilst customers are still present.

JB talked about form filling. Had example of claim for benefit/social fund being refused as made on the wrong form. Customer had asked for help in completing forms but informed by JCP that they could not help with the form filling. CJ said that JCP should have offered customer an appointment to see how best to help.

Workable Pluss asked about permitted work, is the lower limit changing from £20 disregard? CJ and IB said they were not aware of any changes to this at present. However, not yet known what will happen under ESA, although they believe permitted work may continue? CT suggested that this is carried forward until further information is bought out.

Workable pluss also mentioned about the number of hours under permitted work, so as the hourly minimum hourly rate increases, they can work less work hours to stay under the £20 disregard. CJ said he will look into this further.

JW said that there is a Bill and perhaps lobbying needs to be considered. Bill should be on the DWP website. MP Alison Seabeck is on the standing orders committee considering the Bill. **AF to get copy of Bill and post on the website.**

CJ/AF/CT had conversation during break, for future issues, such as particular benefits etc, then if we know in advance, we can arranged for expert staff to come along and help with the questions etc. **JCP rep coming with CJ to 31/5/07.**

Social Inclusion:

CT said that DH not here, as given apologies. AF reported DH now a daddy, James Christopher at 9.45 am weighing 6lb 14oz. Forum offered congratulations to Darin and Maddy.

D£von Pound

Working with customers to provide a single point of access for help with bank accounts, educating people on spending their money. Community banking partnership brings together all organisations to try and exclude poverty. 270 home visits to families with 1.5 workers, in Devon. At a visit, identify issues within the family, what sort of advice, if more intensive, then sign post on to CAB, money advice group, CPAG etc.

KO said that there is opportunity to exchange and share cases and loads. Can offer

budgeting support, help with bank accounts etc, credit union loans. work closely with credit unions who the loans are made through.

Good relation with North Devon JCP office. Surgery in the morning on Tuesday mornings, customers go for crisis loans, not eligible or not entitled and so they sit with Devon Pound who go through applications with them and see where else they may get help. There are high cost lenders out there who will exploit vulnerable customers with very high interest cost loans. Need to promote credit unions more.

Shortly to be working from Plymouth also. Can set up referral processes for clients to be passed onto them for help. They have an 0800 number, but do not yet want to give this to the public as aware that they will become quickly inundated.

MBJ asked about the name and what client group that KO will be working with. KO said that MBJ was right, the Pound is associated with other subjects such as the prison, farms etc. MBJ asked if this was for general people and KO confirmed yes.

Annie from IR asked about type of customers picked up so far. KO said not been able to extract all the management info that they want yet. KO said that people come to them needing loans, but being financially excluded etc. however, they find by sitting down with customers and going through budgeting support, it is found they don't need a loan, it is just they need help budgeting properly.

Discussion around bank accounts as tax credits pay out a large number of giros, KO said that 72% of people do have an account, so not sure if they are hitting an intended target or not.

CT said that it can be hard to find this group. Needs to have 1 priority debt, be on a means-tested benefit and not have a bank account, this then defines the customer as being financially excluded.

Discussion around customers being financially excluded and what classes as financially excluded.

BG asked about the 0800 number, if not being given out, how do we refer? All agencies should be given the 0800 number: 0800 3169296 **not to be given out to customers please**. Need name, address, phone number of the customer and they will contact the customer. Do a telephone assessment which takes 10 to 15 mins. They don't take on customers with multiple debts, only shorter cases. **01837 658579 – general office number in Okehampton**. Customers called back within 1 day, visited within 3 working days.

CJ asked about link with Jobcentre in North Devon, is KO hoping for same referral service in Plymouth? KO confirmed they will be looking at moving forward to same system, but will be dependent on staffing etc. KO looking to build up working relationships with JCP quite quickly. CJ said about Gov agenda about getting customers to have their benefits paid into bank accounts.

Discussion surrounding benefits being paid into accounts and using credit union budgeting accounts.

JS asked about completing paperwork and what times are allocated. KO explained that each customer has about 3 hours of work done with them and then put in contact with other organisations best equipped to help them.

CT asked if KO was going to be a regular forum agenda item? KO said that if wanted then yes, will be on a regular basis.

HMRC

Dave Shaw welcomed to meeting. Following on from visit by John Amos. Still considering who best to participate with the forum. Annie Bush and Dave are here today to help where possible and to bring to our attention up and coming issues that we need to be aware of.

We asked at last forum about knowledge of system down time, DS said that next IT system release goes in over Easter weekend, which coincides with end of year. Therefore system will be down from the Thursday afternoon until the Wednesday of the following week. Therefore, systems down from 5th April until the following week.

After this the next scheduled downtime will be in October, but dates are under discussion.

New version of TC claim form in April 2007. Can still use old claim forms for a couple of months. No significant changes to questions or info requested, but most questions are to do with the completion instructions and additional info requested for nationals of A8 countries.

High number of claim forms returned to TC that cannot be delivered by royal mail and therefore are returned as undeliverable. They want to be able to use up these to avoid wastage. In Cornwall, then these forms will be used to provide stocks. DS asked about whether advisors need one info sheet per claim pack or if they are happy to have 1 information sheet on completing the forms per 10 packs. Agreed that this is helpful and avoids wastage.

DS said about trying to maximize using their resources to hit their target savings. Very keen to work with other agencies, co-locating services in the City, perhaps with JCP and CAB and discussions are underway about this. Perhaps with LA? Working with the LA has worked well in other areas and they hope to progress this further. DS asked if Sally Kittle was still the point of contact for him and CJ confirmed yes.

Trying to improve and provide better signposting for customers. Working with DH from PCC about info going out in Council Tax leaflets with next billing for 2007. trying to target particular groups in the city and very keen to work with advisors.

Issue of hijacked identities and fraudulent claims. This is being looked at. It is not always as a result of problems with HMRC. Not getting reports of large numbers of hijacked customers in Plymouth.

Intermediary helpline number. DS said that all advisors should be aware of this

number and not just through the general number. **Action Point: DS to email AF with the number.**

DS works in operational delivery team. Needs to interact with other units within HMRC. Annie Bush works on a more practical level. There are always problems following IT updates and they work quickly to resolve this.

AB works in an Individual Customer Unit. AB job is looking at type of customer that TC has and how to work with the customer. Rather than implement changes and then think of the effect on the customer, they are to look at the customer first and then what change will help the customer. So for example, they try to look at literacy problems etc. they need to ensure they give the customer all the info needed to make their claims and to understand what is going on.

AB would very much like to know about operational difficulties that our customers experience that cause more frustrations. AB also said that as call centre staff work from scripted information, it is better and less frustrating for advisors to use the intermediatory line. AB very happy to take information from clients etc.

AF gave example of PCAB client who had hijacked identity and problems with sorting out the effects on all the benefits. Etc.

DS explained the process that customers have to go through regarding hijacked identities. Visit to local IR office to be verified etc.

Discussion surrounding communication difficulties with JCP and HMRC and examples given by CJ of JCP.

IM steering group:

SG and SA not here today. CT gave small feedback. CT urged DS to speak to DH for further communications about HMRC involvement with IM strategy. Extra ordinary meeting rescheduled for April.

Secretary report:

Short and sweet on this report today as we have a busy agenda.

- Unfortunately we were not successful with our Lottery Funding application. I received a letter at the beginning of February stating that even though the standard of applications had been high, as there had been so many applications, we were not successful. I have asked now for further feedback on our application and it has been suggested that we reapply in September in the next round of funding. I would suggest that we seriously consider this course of action. We will have more time to prepare our application, rather than the rushed 2 weeks previously. We can learn from our last application and have more time to prepare.
- CPAG memberships. All members were notified of the closing date of 28th February for applications. At this date, we had received 16 applications which

were forwarded around the committee with recommendations for approval/decline as criteria had/had not been met. Of these 16 applications, 15 have been approved. One application was declined as the organisation had not met the basic criterion of attending the Forum of at least once in the last 3 forums. All applicants have been notified.

- Since the closing date, we have received a further 2 applications which will be presented to the committee today with the recommendation of approval.
- If the committee agrees with the recommendation, then this will mean 17 memberships have been approved and 3 remain. After today, there will be one more final mailout reminding members about their applications. A new closing date will then be set, anticipated to be 30th April 2007.
- Finally, I am very pleased today to be able to present our brand new website which is launched today. The new front page logo has been uploaded to day and we are now fully live. All pages are fully accessible. Our logo was designed for the conference leaflet by a CAB volunteer and it is with our grateful thanks to him that we are able to also use this logo on our website.
- Using our computerized resources, I present:

www.plymouthwelfareforum.co.uk

Any other business:

DW has leaflet for work she is doing with young people and passed this around. Any queries, please contact Diane.

NEXT MEETING:

THURSDAY 31ST MAY 2007

1PM TO 4PM

**Warspite Room
Council House
Armada Way**