

## Guidance: Adviceline

### Setting up

- Open the staff & volunteer homepage from the desktop
- Log onto Casebook from the homepage
- Log onto Adviceline from the homepage
- Open the Adviceline template from the homepage
- Click and hold on the blue bar at the top of the template to drag it to the other screen
- Select your Adviceline agent number, save it and log in.

### The telephone

- **To answer a call:** press 10.
- **To end the call:** press 10
- **To put the client on hold:** press the red 'hold' button.
- **To speak to the supervisor:** press the red 'hold' button and then dial 402 for the supervisor (if the client is on hold for too long the call will be terminated).
- **To return to the client:** press the green twinkly button.
- **To transfer the client to an external number:** press 9 then dial the number.



## Introduce yourself and explain the service:

'Thank you for calling Citizens Advice, my name is ... could I take your name please?'

'Thank you [client's first name]. Could I have your telephone number in case we get cut off?'

'And could I have your post code please?'

'Thank you. Have you contacted Citizens Advice before [client's name]?'  
If yes, search for the client's record on Casebook and ask if they're calling about the same issue or something new.

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'How can I help you today?'

Give the caller a chance to explain for no longer than 2 minutes.

## Gateway or Simple Query?

<b>Gateway: Further exploration required</b>	<b>Simple query: Assisted information / signposting only</b>
<ul style="list-style-type: none"><li>• Any further exploration required</li><li>• Emergency or urgent situation</li><li>• Anything complex or with related issues</li><li>• Benefit or debt issue</li><li>• Any dispute</li></ul>	<ul style="list-style-type: none"><li>• Has to be the client's <b>first contact</b> about the issue</li><li>• No time limits or emergencies</li><li>• A stand-alone issue – not linked to any other enquiry areas</li><li>• Must <b>NOT</b> be a debt or benefit issue</li><li>• The client must not be in a <b>dispute</b></li><li>• It must be a simple issue and not complex</li><li>• Further exploration is <b>not</b> required</li></ul>

## **Gateway: if further exploration is required**

**'Thank you [client's name]. I'll look into that for you very shortly, but first I need to record some information to help with your enquiry. If you consent to this I will briefly summarise how we use and store this information.'** [Client consents].

**'We record information about you and your problem so we can help you, and so that my colleagues can check later in case we've missed anything. It will also help if you need to come back to us.'**

**'We also use the issues our clients come to us about to improve our service and tackle wider issues in society in a way that doesn't directly identify them - we keep what you tell us safe and confidential and you always decide what you share with us.'**

**'Please tell us if you'd like to know more about how we use your information.'** [If requested refer to [citizensadvice.org.uk/my information](https://citizensadvice.org.uk/my-information)].

Register the client on Casebook. At this stage you do **NOT** need to record special category data. However, if during the course of the call it becomes apparent that the issue relates to any of the client's SCD, you will need to ask for explicit consent to record and store this data.

**'We need your explicit consent to keep some information, including your [select from the list below] and use it for the purposes I've already explained. Could you confirm that you give consent to this please?'**

- **ethnicity**
- **religion**
- **health conditions**
- **sexual orientation**
- **trade union membership**

**'This is a brief assessment to see how best we can help you today. I will help you as much as I can during this call, but if you need further help I will be able to arrange that for you. From what you've told me already I understand your enquiry is about...'**

**If the client consents to the use of their special category data:**

- Tick the relevant box(es) in Casebook. You can only make reference in your case record to information relating to the data to which the client has consented.
- Update Casebook if any changes to an existing client's record.

**If the client does NOT consent to the use of their special category data:**

- Don't select consent to store special category data in Casebook and don't record any special category data. You cannot make reference in your case record to any information relating to this data.
- Update Casebook if any changes to an existing client's record.

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**Simple Query: assisted information or signposting only**

**'We have information that I can email to you which will help you with your enquiry.'**

**'Do you have access to the internet and are you confident to use it?'**

**'Are you able to understand and follow-up on written information?'**

**'Just to let you know there will be no written record of this conversation so we won't have any details if you ring us back. Is that ok?'**

Provide the information, invite the client to call back if necessary, transfer to the after-call survey and record as Simple Query.

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## **During the call:**

- Type your notes into the gateway template while listening to the client. You might need to explain that you will be typing while the client talks and may need to ask some questions.
- You can't use body language or facial expressions so speak slowly and clearly, and acknowledge the caller with verbal responses.
- Avoid lengthy periods of silence by explaining what you're doing.
- Clarify as you go along if necessary.
- Summarise the key facts clearly without repeating verbatim everything they have told you:

**'So just to check that I've understood you correctly ...'**

## **If you have to call the client back:**

It is very important that you select **call back** on the system so that your activity is recorded.

## **For a third-party call:**

You can only give general information from the public site and signpost to other organisations.

## **If the client is calling from outside the Hertfordshire Adviceline area:**

Call the client's local office and establish the appropriate action.

## **To find the client's local Citizens Advice:**

- Select **Boundary information** below the client's details on the right-hand side of their client record.
- For clients in Hertfordshire or Chelmsford, use the Adviceline referral tool.
- For clients outside Hertfordshire, type the name of the LCA into the search bar in the 'contacts' page of CABlink.
- The selected LCA is highlighted in green. Never give the client the private number.

## **Transfer the client to the after-call survey:**

**'I'd like to transfer you to a very short survey so you can rate your satisfaction with today's call. It is optional, but we would appreciate your feedback. The information will only be used to monitor the service we provide.'**

If the client agrees: **'If you stay on the line you will be transferred to the survey. Thank you very much.'**

The call is transferred to the survey automatically when you end the call.

## **After the call:**

The system allows you 30 minutes to write up the case record (indicated in seconds and by a red line on the screen). After this time you will be automatically logged on and calls put through to you. If you are not ready to take a call you can either:

- Select **Extend** for another 30 minutes write-up time; or
- Don't pick up your phone if it rings. The call will be re-directed back to the queue.

## **To put the client in the work queue:**

- In the **Follow-on actions** field, select **Refer to another Citizens Advice** from the drop-down menu.
- Select the **add action** box and complete the fields.
- The reason for referral should explain why an appointment is needed and include the work queue text in the Adviceline template.
- Under **Task list** select the relevant **Adviceline work queue**.

## **If the client is already in the work queue:**

You can give the client the number of their LCA if they are calling about an existing enquiry (eg where they missed the call back from the receiving office). Refer to the Adviceline referral tool for the correct number to give.

## **In an emergency:**

You can call the client's local office directly yourself, but check with the ASS first.

## Adviceline script

'Thank you for calling Citizens Advice, my name is ... could I take your name please?'

'Thank you [client's first name]. Could I have your telephone number in case we get cut off?'

'And could I have your post code please?'

'Thank you. Have you contacted Citizens Advice before [client's first name]?'

'How can I help you today?'

### Gateway:

'Thank you [client's name]. I'll look into that for you very shortly, but first I need to record some information to help with your enquiry. If you consent to this I will briefly summarise how we use and store this information.'

'We record information about you and your problem so we can help you, and so that my colleagues can check later in case we've missed anything. It will also help if you need to come back to us.'

'We also use the issues our clients come to us about to improve our service and tackle wider issues in society in a way that doesn't directly identify them – we keep what you tell us safe and confidential and you always decide what you share with us.'

'Please tell us if you'd like to know more about how we use your information.' **[If requested refer to [citizensadvice.org.uk/my information](https://citizensadvice.org.uk/my-information)].**

### Consent for SCD:

'We need your explicit consent to keep some information, including your **[select from the list below]** and use it for the purposes I've already explained. Could you confirm that you give consent to this please?'

- ethnicity
- religion
- health conditions
- sexual orientation

- trade union membership

'This is a brief assessment to see how best we can help you today. I will help you as much as I can during this call, but if you need further help I will be able to arrange that for you. From what you've told me already I understand your enquiry is about...'

**End of call survey:**

'I'd like to transfer you to a very short survey so you can rate your satisfaction with today's call. It is optional, but we would appreciate your feedback. The information will only be used to monitor the service we provide.'

**If the client agrees:** 'If you stay on the line you will be transferred to the survey. Thank you very much.'

**Simple Query:**

'We have information that I can email to you which will help you with your enquiry.'

'Do you have access to the internet and are you confident to use it?'

'Are you able to understand and follow-up on written information?'

'Just to let you know there will be no written record of this conversation so we won't have any details if you ring us back. Is that ok?'

'Please call us back if you need any more help.'

