

WORKERS MEETING 14/4/2021 (Kalpna)

Attendees: Farookh, Catherine, Rosie, Vikki, Kalpna, Ciara, Michael, Chris, Jonathan, Carmel, Roy, Gillian, Vanita, Jamie, Jim, Judeth, MAIcolm, Judith, Shelly, Patsy, Penny, Raminder, Rita, Rob, Tony Swabe (new trustee) David, Gladys, Solinda, Sue

Apologies: Frank, Steph and Ian

Due to Salim leaving and awaiting new CO recruitment, CO update not possible

ASS Update

All tasks to be completed within deadline; particularly reworks as these are required to prevent possible detriment or to provide missed information or to correct incorrect advice. To speak with an ASS if need time off rota to complete tasks.

Training Update - Rosie

- Herts cluster group have upcoming Universal Credit training. People invited to speak with Rosie if interested. Rosie will however, contact people in order to offer relevant training courses.
- We have current assessors moving to advisor training next week. Rosie will be asking advisors to support this training by agreeing to host observations.
- 5 trainee GW assessors who started last January are now all qualified : Roy, Rita, Gillian, Raminder and Ian. Congratulations!
- All the new trainees have done very well with the remote training.

ASM Update - Catherine

- All debt assessors/advisors and ASS to complete the “Breathing Space” training on Wiseradviser. Once completed, to let Rosie know so training records can be updated.
- Annual SMCR training (providing financial advice) needs to be completed by all. This needs to be done yearly. If you completed it

last year, you should get an email informing you that the training has expired and needs to be done for the current year.

- We have a column in the Watford Observer.
- Catherine leaving for maternity leave from June. Handover will commence with Kalpna from 1st May so Catherine may refer ASM queries to Kalpna as part of her training.
- We will be recruiting for a new full time ASS. We will be recruiting internally and the advert will be placed on S&V shortly. Pls contact Catherine if interested in the role
- We will be receiving further £5000 for the Winter Covid Grant. If a cl is found to be eligible, we must obtain their consent to send their info to Welwyn and consent to send email (check email addresses) we can enter their name on the waitlist. There is new guidance on how this grant will be paid.
- We still have £80 left from the original grant and must be used up by Friday 16/4/21.

STATS:

- 475 AL calls last month - highest over the last 5 years
- 231 Advice appointments
- 1673 Case Notes opened
- 784 cases checked over the last 30 days
- 352 emails received - highest since we opened the info@ account
- 30 Evidence Forms raised
- SQ to be updated

ICT Update - Malcolm

- The new cl enq form is now on S&V for everyone to try before we go live. This cl form will replace the current info@ email.
- If anyone thinks of any info that would be useful to have on S&V, discuss with ASM and if approved can update S&V
- Password to S&V will be changing; all will be informed verbally at briefing and you can also contact ASS to get the new password.

Trustee Update - Farooq

- We have 3 new trustees, Tony, Richard Bolton and Daniael. Their relevant backgrounds will assist the varying skill set of the Board.
- CO interview took place last Friday 9/4/21. The Board are now considering the applicants and will soon announce the appointment of the new CO.

H & S Update - Catherine

- When at the office, everyone must sign in and out on the log on S&V page
- The light in the toilets must be left on during the day and only switched off at the end of the day to prevent different people touching the switches
- When working from home, please remember to take breaks. It is good for your mental health to get up walk around and get some fresh air at lunch time. If anyone is struggling to work from home, please discuss returning to the office with ASM.
- Everyone to please adhere to the requirements of social distancing and regularly using hand sanitizers/hand washing.

TALK ON QUALITY - Rosie

Case Recording - 5 top tips:

1. Case Note Title:

- This must be short (not a sentence) to describe the issue eg benefit application. This is so that we can tell at a glance what the case note is about, particularly helpful when searching.

2. Always use a template:

- download the adviser/gateway template each time you need to do a write up. Do not save on your desktop as the templates are regularly reviewed and updated.
- The purpose of the template is to maintain consistency and to ensure we haven't missed exploration of any important issues
- Presentation: viewed advice yes/no or n/a and GW templates, guidance. Advised to delete directions but not any of the headings as the latter show that we have considered the point - say yes/no or n/a

3. Sources:

- If possible, include at least 1 source and explain how this relates to cl's enq. and how it is shared. The source should be specific not general.
- The edit on the Sources, allows for a note to be placed to the source

Outcome preferred eg if there is a benefit overpayment then exp the cl's right to MR etc

Next Steps: to achieve the desired outcome and what to do eg email DWP/discuss to revert to CA when decision received etc.

- All advice given must be supported by source if possible.

4. Language:

- Avoid language that indicates judgement and opinion eg cl “needs to” or client “should” to this. Instead state : client “agreed” or client “to contact”

5. How is client progressed?

- Client should have been moved/progressed if not on all aspects then extensively.
- CI should be booked a follow up appointment if required or invited to come back if require further advice or on receiving an outcome.

Ensure that the email address and all contact details are up to date, all consents are updated and enter expected/achieved outcomes and check correct funder codes have been used.

Next meeting: Thursday 13/5/21