

# **In and Out of Work Project**

## **Customer Journey Out of Work**

*Department for Work and Pensions  
Her Majesty's Revenue and Customs  
- working closely with local  
authorities across England, Scotland  
and Wales*

**Version 3 25/02/09**

# The Wider Context

- Meets customer requirements
- Supporting the Government's wider service transformation agenda
- Fits with the principle of reducing worklessness
- Builds on the success of 6 pilots evaluated in March 2008
- National roll out to all Local Authorities by December 2009

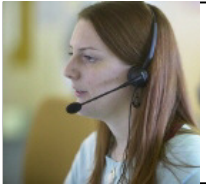
## Why are we introducing this change

- Providing a single point of customer contact for key In and Out of work support
- Improving the customer experience by introducing a “one touch” philosophy - with all required information and evidence gathered once at the initial point of contact, and shared across three organisations
- Reducing duplication of data
- Enabling quicker payment of benefits and reducing overpayments
- Delivering what customers want
- Working more closely together between JCP, HMRC & LA
- Encouraging customers to take the first step into the labour market, particularly for short-term employment

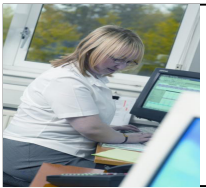
# The Customer Journey – Representations



- is The Customer



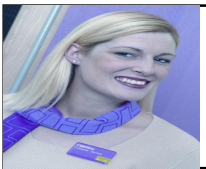
- is The Contact Centre



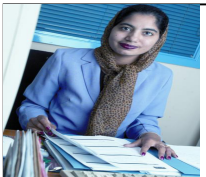
- is The Benefit Delivery Centre



- is The Financial Assessor



- is The Personal Adviser



- is The Local Authority



- is The Tax Credit Office

## Meet Hana

Hana is aged 30. She was a wages clerk but the factory she worked for has shut down so she is now unemployed.

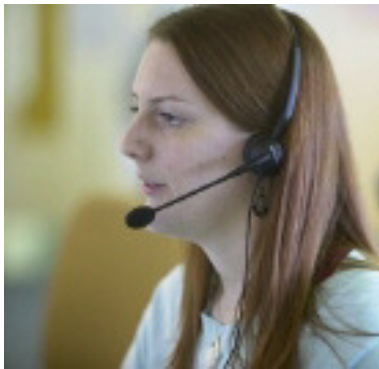
Hana goes to her local Citizens Advice Bureau for help.

They advise her to phone Jobcentre Plus and give her the Contact Centre number.



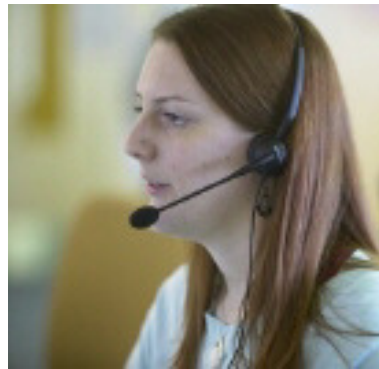
# Hana telephones the Contact Centre

The Customer Service Agent takes a call from Hana wanting to claim Jobseekers Allowance.



Benefit claim details are taken, including HB/CTB details and Tax Credits in one single call. The earliest available Work Focused Interview is booked and Hana is advised verbally of the date, time and place of interview and what evidence to bring to the interview. Hana's case has been identified as requiring a preview by the Benefit Delivery Centre.

Hana is in receipt of Working Tax Credit so the Customer Service Agent calls the Tax Credit Office on behalf of the customer and informs them of the change. Any tax credit run on details are also collected for the Benefit Delivery Centre and recorded in CMS notes.



This is done whilst Hana remains on the line to ensure the correct information is supplied accurately to the Tax Credit Office. Hana does not have to make a separate call to the Tax Credit Office. The Contact Centre also offer to conduct a jobsearch for Hana.

When the Tax Credit Office receive the call, they update the Tax Credit system with the change to Working Tax Credit, and assess any 4 week run on entitlement and if overpayment action is required.



At the end of the call Hana knows exactly what evidence to bring in to the Work Focused Interview.



# Hana is contacted by the Benefit Delivery Centre

The Benefit Delivery Centre has previewed Hana's case as she was identified by the Contact Centre as having a trust fund. Additional evidence is required in order to process her claim.



Hana receives a telephone call from the Benefit Delivery Centre to advise her of what additional evidence requirements has been identified. She is also reminded of all evidence requirements and date, time and place of the Work Focused Interview.



Hana gathers the necessary information in readiness for her Work Focused Interview.

**Cases not requiring contact by the BDO will be contacted by the DASO**

## Later...

Hana arrives at her local Jobcentre and is greeted at the entrance by Carol, the Customer Service Manager.



Carol directs Hana over to Nigel for her Financial Assessor interview.

# At the Financial Assessor interview

The Financial Assessor checks that Hana has provided all necessary evidence for her benefit and HB/CTB claim. Hana does not have proof of liability of rent and as she is a private tenant she is given a Landlord Declaration form for the landlord to complete which is to be returned to the Local Authority.

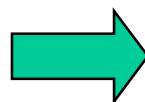


This is documented on the Housing Benefit evidence checklist (HBEC) that is sent to the Local Authority. The Customer Statement is printed and Hana signs it.

Hana has provided all appropriate evidence and she does not need to contact HMRC and the Local Authority.

The Local Authority Input Document and the HBEC are sent to the Local Authority by the Jobcentre that evening with any required evidence attached. In e-LAID enabled sites only the HBEC and evidence need to be sent clerically.

When the Landlord Declaration form is received at the Local Authority the HB/CTB claim can be processed



At the end of the interview Hana is advised of the next steps on her claim and how she will be paid. Nigel then introduces Hana to Jill for her Work Focused Interview with her Personal Adviser.

# At the Personal Adviser interview

The Personal Adviser conducts the Work Focused Interview with Hana and at the end of the interview she is given an ES40 and an Into Work leaflet. She is advised of the Into Work process and what to do when she starts work.



Hana is advised of next steps and appropriate contact information.



Hana leaves the office knowing:

- That as she has supplied all relevant evidence so her benefit entitlement will be determined quickly
- Any entitlement to HB/CTB will be decided when the Local Authority receive the Landlord Declaration form
- Who to contact for both work and benefit queries
- Where to go for help finding work
- What kind of help is available
- What to do when she starts work.

## Hana receives her benefits



Hana's claim has been processed and she receives her benefits quicker than she thought.

She has only had to contact one Department to sort out all her benefits and she is very confident that when she starts work and contacts Jobcentre Plus any money she is due will be paid and she will not have to contact the Local Authority or Tax Credit Office.

# **In and Out of Work Project**

## **Customer Journey Into Work**

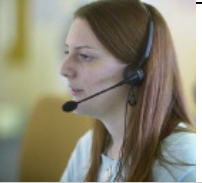
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- is The Jobcentre



- is The Benefit Delivery Centre



- is The Local Authority



- is The Tax Credit Office

## Meet Patrick

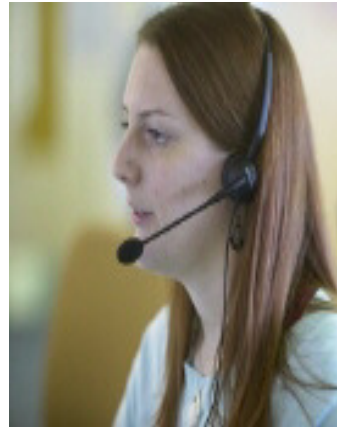
He has found work.



# Patrick telephones the Jobcentre from home using the number he was given on the Into Work leaflet inserted into his JCP40



The Jobcentre takes a call from Patrick informing them that he has started work.

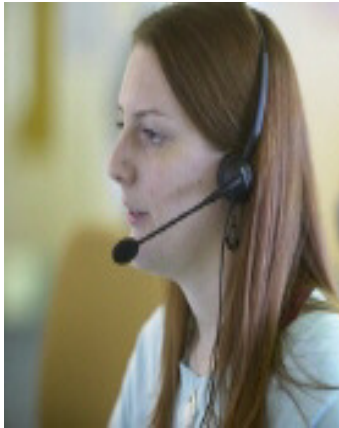


Patrick's new job details are taken over the phone in a single call. This means that Patrick does not have to attend the Jobcentre to end his claim.

Customer information, including details of work, are recorded using the i-Works application (IWK4 & IWK2). Information is transferred by secure e-mail to the Local Authority and Benefit Delivery Centre.

# During the call

Patrick is asked if he has a current Tax Credit and/or HB/CTB claim.



Patrick has a HB/CTB claim and a claim for Tax Credits. The Jobcentre takes all the appropriate details from the customer about HB/CTB and sends them electronically to the Local Authority. Patrick is advised about the evidence he needs to supply to the Local Authority. They also telephone the Tax Credit Office to report the change. This means that Patrick does not have to inform the Local Authority or the Tax Credit Office separately.

**When the IWK4 is received at the Local Authority, they check CIS for Tax Credit details and they make a decision on the information received.**



**When the IWK2 is received at the Benefit Delivery Centre they close the claim down and trigger an Electronic Transfer of data (ETD) to the Local Authority to inform them of claim termination.**



**The Tax Credit Office input the change into the Tax Credit system and make a decision on the Tax Credit award.**



Patrick's benefit claim has been closed and his HB/CTB & Tax Credit re-assessed much quicker than he thought.

He starts work knowing all his benefits have been sorted out.