

Spotlight on: Journal messaging

Introduction

This Spotlight has been developed to give staff a better understanding of how to use the journal.

The journal is a tool which belongs to the claimant. This is unlike Claimant history, which they cannot see in their account. See Claimant history

Feedback from staff has shown that claimants sometimes find it difficult to read or understand journal messages.

See Journal messaging

This spotlight will remain in place until the Universal Credit design and supporting products are developed further.

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Claimant journal

Although the journal is a tool which belongs to the claimant, it is used by claimants and staff to communicate. Its main function is to provide a full picture of the claimant's claim and track their activity.

Anything written in the journal of a couple claim will be visible to the claimant and their partner. Therefore, health information should not be disclosed in the journal as this must not be shared with partners.

It is important that claimants are aware the Labour Market tool 'Job applications' is used to record job application activity, rather than the journal. Job applications can be updated with progress, and notes can be added relating to each job.

Claimants who report job applications must still use their journal to report other work related activity (e.g. work preparation, or work search activity that is part of a specific job application). See Labour Market Tools Claimants can write messages in their journal 24 hours a day 7 days a week. However, they should be made aware their messages will not be responded to outside of office hours. Office hours are 08:00-18:00. The agent's full name is shown on the agent side when they make a journal entry, but only their first name is displayed on the claimant side. Journal entries must:

- be clear, concise and free of departmental jargon/text speak
- be tailored for each claimant, and in the case of a couple claim the claimant's name must be included in the entry
- meet the requirements of the General Data Protection Regulation and DWP data standards
- not include telephone numbers for individual staff - if the claimant needs to call, give 0800 328 5644
- not include links to external sites - although signposting is allowed
- not include agent notes

Important Note: Documents must not be uploaded to the Journal unless the Universal Credit Service provides specific instructions to do so. For example, the 3 Youth Obligation letters. These must be uploaded individually.

Journal communication

The journal is the main method for staying in contact with claimants. The quality of journal entries can help create and maintain a good relationship with claimants.

Poor quality journal messaging leads to confusion, and results in an increase in unnecessary messages and inbound telephony.

Think about the following:

- offer the appropriate professional greeting
- write entries in a polite, friendly, open and honest way
- consider the claimant's situation and any potential for offence - think about what benefits the claimant is receiving, and the range of situations that implies
- tailor approach to suit claimants needs, check for understanding and reword if necessary
- consider accessibility needs, and use reasonable adjustments where appropriate
- read the message you have written from the claimant's perspective:
 - do you understand what you have written?
 - would you be happy to receive the message you have written?
- manage claimant expectations, for example give clear deadlines
- be clear about what the claimant could gain or lose if they take required action/don't take action
- give reasons when asking the claimant to provide information or to take action
- explain delays and give apologies when required
- use the spellcheck tool in the Service:

- be mindful of your punctuation as this can change the context of what you are writing
 - update claimant profile and claimant history clearly and accurately
-

Writing clear and simple journal messages

When writing journal messages, to make the information easier to read and understand, consider following these steps:

- use plain English - it's clearer, simpler and people prefer it
- write less, say more - keep content short, clear and simple
- follow a logical layout - important information first
- align text to the left and keep a consistent layout
- use headings, sub-headings and line breaks to break-up long text
- use a new line where a long word goes over line size
- highlight important points in **bold type** – do not underline words, use italics or write in capitals

To make it easier for claimants to understand what is being communicated:

- do not use acronyms
- do not use 'emoticons' (combinations of letters which represent emotions). For example:

- :-) happy

- :-(sad

Do not use the shortcuts of 'text messaging'. Some people may understand what 'cant w8 2 cu' means, but others do not.

Consideration should be given to the structure and language used when writing journal messages to instruct claimants to take action to progress their claim.

Structure:

Break the contents up logically, for example:

- greeting
- purpose of journal entry (I need xxx from you)
- action needed from claimant (you need to do xxx)
- timing
- consequences of the claimant not taking the action

Language:

Sentences must be written in the active voice as these are easier to understand than those written in the passive voice. The active voice clearly identifies the action to be taken and who is performing that action.

Example of passive voice:

- by Friday your evidence should be provided

Example of active voice:

- you must provide your evidence by Friday

To make sure people understand and engage with messages, there are 4 communication principles:

- be clear
- be helpful

- be respectful
 - be positive
- See Written standards

Journal best practice

Use asterisks to emphasise words, for example ****XXX****

For points and lists, use a dash followed by a space:

- this is a point
- this is another point

Use shorter words and sentences if possible, to keep it clear and simple. Long or complex words can often be replaced by a single and sometimes shorter word which means exactly the same thing. This is easier for the claimant to read and understand. The table below gives some examples.

Long and complex

sufficient
 numerous
 component
 assistance
 remuneration
 the majority
 that is included in
 at the present time
 in the event of
 in order to

Short and clear

enough
 many
 part
 help or support
 pay
 most
 in
 now or currently
 if
 to

Choose your words carefully. Use words and phrases you would use if talking to the claimant.

Try to mention just one idea/action in each sentence. Too much information in one sentence can be confusing or overwhelming:

- do not use - This training will improve your chance of finding work and give you new skills to help you earn more
- use - This training will improve your chance of finding work. It will also give you new skills to help you earn more

Concentrate on the action. Use clear, direct verbs rather than phrases with long strings of nouns:

- do not use - If you demonstrate compliance, we will...
- use - If you do everything needed, we will...

Be consistent. Don't use several terms for the same thing:

- do not use - Your coach, your adviser, your contact
- use - Your work coach

Be friendly rather than unnecessarily formal – which appears distant and out of touch.

Do not use abbreviations.

Best practice examples of journal messages

The following are bad and good examples of writing journal messages.

Bad example:

Hi Kath

I have finally managed to update your record and calculate the arrears I think are due. Once again I have had to send my calculations off to be checked. I cannot make a payment until my figures have been checked. I have set an Agent Alert for 6-4-2020 so that next month you should receive the correct Housing Elements.

Kind Regards Lauren

Good example:

Hi Kath

I am writing to let you know your landlord has verified your correct amount of rent to us today. I have now updated your account and calculated the arrears you are due. The correct amount of rent will now be paid each month and the arrears due will be explained and paid on your next statement.

Kind regards

Lauren

Bad example:

Hi Brian,

you need to log into your account at your earliest convenience to make sure that your full name (including any/all middle names) is recorded on your claim. This is to ensure that all of the information which we hold for you is correct across all of our systems.

Thanks,

Jack - Universal Credit. CM

Good example:

Hi Brian

I am currently processing your claim for Universal Credit.

I would be most grateful if you could update the personal details on your account to include any middle names you may have by 25/11/19.

You can do this by going to the homepage of your account, then report change of circumstance, then amend personal details.

This will ensure all of the information we hold for you is correct and your 1st Universal Credit payment can be made on your due date.

Many thanks

Jack

Standard journal messages

There are 3 standard journal messages which must be used when communicating with claimants about action they need to take to progress their claim.

The table below shows the 3 messages.

Template title	Subject	Standard journal messaging to use when informing claimants of the activity they need to take to progress their claim
Council Tax reduction	Council Tax reduction	You'll need to contact your local council to claim your Council Tax reduction. Visit your local council's website or call them on 01234 567890.
Childcare costs general information	Help with childcare costs	You may be able to claim up to 85% of your childcare costs through Universal Credit.

Starting work

Confirm the date you started work

Visit GOV.UK for more information on child
We've been told that you've started work.
You need to update your online account using

Group journal messages

Group journal messaging can be used to alert numerous claimants to job opportunities, job fairs or skills/training courses that may be suitable for more than one claimant.

To set up a group journal message:

- select "Add group journal entry" on the agent dashboard
- on the "Add group journal entry" screen type your message into the free text box
- to choose the claimants you want to receive the message, select the "Select claimants" button
- select the check box next to each of the claimants names you want to receive the journal message
- select "Add claimants" to confirm the claimants you want to receive the message
- select "Add journal entries"
- select "Done"

When writing group journal messages, consider your audience - is the message appropriate for all of your caseload?

For example, do not have journal conversations about going on holiday, leaving the department or leaving due to promotion. Do not wish your caseload good luck or all the best in their future job search as you could be sending it to a claimant who is terminally ill or bereaved.

Deleting journal entries

There is a risk that deleting journal messages which contain attachments could destroy necessary audit trails in the event that the Department is ever legally challenged.

Messages can only be deleted by staff within 30 days of them being created. It is therefore essential to check that messages, especially those with attachments, are correct at the time they are created. If errors are noticed, the message must be deleted straightaway, and replaced with the correct information.

Claimants are often confused when messages they have previously seen suddenly disappear without any explanation. Therefore, if messages are deleted remember to add a brief explanation so the claimant is aware of what has happened.

The information below, and in the next section, gives circumstances when journal entries can and cannot be deleted.

Best practice when deleting journal entries

The following is good practice to avoid causing the claimant confusion:

- if journal entries are deleted and replaced with a corrected version, the box to notify the claimant of the new journal entry by text or email must be unchecked - the claimant then receives just one text or e-mail informing them of a journal entry (provided the mistake is rectified)

quickly, this reduces the risk of the claimant noticing a change in their journal entries)

- where journal entries are deleted and not replaced, a note for the claimant explaining the deletion could avoid confusion

When to use the 'delete' function and when not to

Example of when to use the 'delete' function

The following message and uploaded SSP1 form were deleted from the claimant's journal 64 days after they were originally posted.

'Message - SSP1 received states - Employer can no longer pay her. SSP1 attached'

The form was incorrectly uploaded to the journal. This was subsequently corrected and uploaded to the claimant history for a Real Time Information dispute.

A message was sent to the claimant to explain why the original message was deleted.

Other circumstances when journal entries can be deleted:

- addressed to wrong claimant
- personal information has been added
- spelling mistakes
- incorrect dates
- due to assurance activity
- incorrect letter uploaded

Example of when not to delete journal entries

A claim had the following message and attachment in the journal to advise the claimant about Work Choice programme.

'Message *** WORK CHOICE *** (Transitional Employer Support Grant) Please read the enclosed information about Work Choice (Transitional Employer Support Grant) which aims to help people who have a Fit Note take your next steps towards training and work. We will discuss this at our next conversation. Attachment – Work Choice info.' (Transitional Employer Support Grant)

At the claimant's next appointment 26 days later, due to a change in the claimant's circumstances, the message was deleted as the information was no longer relevant.

This should not have been deleted as it was relevant to the claimant's circumstances at the time it was entered in the journal.

Unacceptable customer behaviour

The correct process is to report the incident through existing Unacceptable Customer Behaviour (UCB) procedures.

The nominated UCB manager will determine a suitable response/warning - writing to the claimant if necessary.

If there are questions posed by claimants in abusive journal messages, these must be answered by the work coach or the case manager. The UCB manager does not action these in their response to the claimant.

Staff must not respond to abusive comments in journal messages. Staff need to be aware of the type of message that is appropriate. See [Unacceptable Customer Behaviour](#)