

## PIP New Claim telephony data gather

### PIP new claim and DLA reassessment

1. The telephony agent will be ready to take the PIP claim once they have gone through the necessary SmartScripts in CAMLite see link to Inbound call and security smartscript and the manual checks. See Manual checks step actions
2. When a reassessment case has been identified the new claim can be taken as usual. **REMEMBER** reassessment new claims are asked if they would like to re use any DLA medical evidence. **NOTE:** If the claimant is SRTI we will not be able to use medical evidence due to timescales. See: Reassessment re use DLA medical evidence
3. If a reassessment claimant does not have bank details to hand we can ask their permission to use the DLA account details held in DLACS, see how we pay you. For further information on reassessment see: DLA reassessment new claims

### Reinstatement of DLA request following termination

4. If the telephony agent is taking a new claim because the claimant's DLA claim has been terminated because they did not comply with the process, the claimant can make a request to have their DLA reinstated. The agent will create a CAMlite to do task and advise the claimant. See: Claimant wants reinstatement of DLA following termination for step action.

### Duplicate Claims and Advance Claims

5. On launching PIPCS from CAMLite the agent will be automatically directed to the Applications List page within the Person/Prospect Person record. The Applications List page displays all applications held for the person along with their status.
6. When the Agent selects the 'New Application' action, either from within the Applications List Page or from the Actions Menu on the Person/Prospect Person record, the following warning message will be displayed 'Case already exists refer to the Regional Benefits Centre' if there is a current application being progressed or an on-going claim.
7. The warning message will be displayed in the following circumstances:
  - Application status is pre-submission
  - Application status is submitted
  - Application status is decision made and PIP has been awarded
8. If there's an existing entitlement to PIP, the agent will not take the data gather but determine if the request a 'Duplicate Claim' or an 'Advanced Claim'. **NOTE:** an advance claimant may be age over 65.

### Launch the IEG script

9. The agent will launch 'PIPCS' from within CAMLite and start the data gather form the applications list page, see link to launching PIPCS application homepage

10. Advise the claimant of the following:

**Script: "To make your claim, I will need to ask a set of questions. This is the first stage of the process and you may be asked to provide more details following this phone call. I will now take the details for your claim. I may have to ask you to repeat some of the information that you've just given me, that's so I can make sure it's right on your application."** Optional: "The call may take up to 15 minutes (adjusted if necessary), there may be silences as I input information. Please bear with me as I need to ask all the questions in full."

Complete the data gather. See link to PIP New Claim data gather

## Unable to launch the IEG script

11. A workaround is in place if CCS agents are unable to launch IEG script through CAMLite. In some instances, when CCS agents are trying to launch the IEG script in CAMLite to complete the PIP claim, they are prevented from continuing. see link to launching PIPCS application homepage

12. The agent should access the electronic version of the blank PDF claim form via desktop icon and complete the PIP claim with the claimant. The agent must follow the sequence of questions in the claim form and read out the legal mandatory text paragraphs for:

- Consent
- Bank details (How we pay you)
- Finding out how much we have paid into the account
- If we pay you too much money
- Declaration

## Consent mandatory text

13. The 'Consent' wording is available on page 13 of the claim form. The CCS agent must read out the consent wording to the claimant

## Bank details mandatory text

14. The 'How we pay you' mandatory text is not on the claim form. The CCS agent must read this wording to the claimant.

**Script: "We ask for your account details before we decide on a claim so we can pay you straight away if you qualify for benefit. This doesn't guarantee that you'll get Personal Independence Payment."**

15. 'Finding out how much we've paid into the account', The CCS agent must read this wording to the claimant.

**Script: "You can check your payments on account statements. The statements may show your National Insurance (NI) number next to any payments we've made. If you think a payment is wrong, get in touch with the office that pays you straightaway."** If we pay you too much money', the CCS agent must read this wording to the claimant.

**Script: "We have the right to take back any money we pay that you're not entitled to. This may be because of the way the payment systems work."**

**For example, you may give us some information which means you're entitled to less money. Sometimes we may not be able to change the amount we've already paid you. This means we'll have paid you money that you're not entitled to. We'll contact you before we take back any money."**

**Note:** The agent **does not read out:** 'Finding out how much we've paid into the account' or 'If we pay you too much money'. These statements have been removed from the script. The screens will be updated at a future date.

## **Declaration**

16. The Declaration is on page 19 of the claim form.

The CCS agent **does not read out** the following first paragraph because it is only relevant if the form is being issued by post.

17. **Do not read out:** 'We cannot pay any benefit until you've signed the declaration and returned the form to us. Please return the signed form straightaway.'

## **Completing the call**

18. On completion of the call with the claimant, annotate the claim form **within the header field** (page1) the following additional information:

- 'Surname Field' insert today's date (the date the claim was completed with the claimant) and whether IDV passed or failed.
- 'Other names Field' insert connection ID from CAMLite Contact History
- 'Postcode Field' insert your initials and Location/Site you are working from
- 'ID Field' insert the time the PIP claim was completed with the claimant

19. Print off the PIP claim locally and send to the relevant Benefit Centre in a purple polylope via internal courier on an individual basis.

## **BC contacts and courier addresses**

20.

<b>Benefits Centre</b>	<b>Contact and Address</b>
Bootle	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Bristol	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Scotland	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Wales	XXXXXXXXXXXXXXXXXXXXXXXXXXXX
Yorkshire	XXXXXXXXXXXXXXXXXXXXXXXXXXXX

[Contact email addresses redacted - Exclusion 40 applied: Personal information]

Spare paragraphs 2122

## **Requests paper form**

23. You can consider issuing a paper claim form if the request is made by:

- the claimant, Personal Acting Body (PAB), Corporate Personal Acting Body (CPAB), appointee

- potential appointee, that is if the claimant is too ill or disabled to claim for themselves and the third party caller wants to be appointed to act
- a third party if the claim is being made under SRTI
- claimant has UCB control measures by post.

24. We would expect everyone to make the claim by phone unless they were unable, or found it very difficult to use the phone or the claimant has UCB control measures by post only.

25. If, for example, a third party potential appointee asks for a claim form because the claimant is too ill or disabled to claim for themselves and the third party wants to become an appointee, then this in itself isn't a reason for needing a paper claim form since we can take the phone call from the third party as the prospective appointee.

26. **Third party calling to claim under SRTI:** Where the third party agrees to claim by phone, ask if the claimant is with them. If so, ask if we can ask the claimant a couple of questions then we'll continue the call with you (the third party). If the claimant is not with them, carry on with the call. The claimant does not need to be present if the claim is being made under SRTI.

27. When a caller requests a paper claim use the following text to explain:

- The way to make a claim for PIP is by phone.
- Paper forms are for people who are unable to use the phone because of their disability.
- It's quicker to claim by phone. It can be done today. I can do that with you now.
- It's only some basic questions about your personal details now such as name, address, DOB, GP or other healthcare professional details, nationality, bank details. Then we'll send you a form so you can tell us in writing about your disability and how it affects you.
- I can wait for you to gather the information you need.
- If you have difficulty with or don't understand some of the questions I can help you.
- You don't have to discuss your disability in detail during this call. We'll send you a form so you can tell us in writing about your disability and how it affects you.
- Someone can speak on your behalf as long as you're there to give permission for them to speak for you.

28. It may be appropriate to issue a paper claim when:

- The claimant is unable or finds it very difficult to use the phone themselves for any length of time and has no one to speak for them.
- The claimant has speech and/or hearing difficulties or difficulty communicating and cannot or does not wish to use text phone and has no one to speak for them.
- The claimant refuses to claim by phone after the benefits of claiming by phone have been pointed out.

**NOTE:** This list is not exhaustive and there may be other reasons why a claimant cannot complete the data gather over the phone.

29. There is a requirement for minimum data to issue a paper claim form:

- Name, address and either date of birth or NINO of claimant
- If there is a Personal Acting Body (PAB), for example appointee, Power of Attorney, Deputy (Scotland), potential appointee or third party where

the claim is made under special rules for terminally people (SRTI):  
name and address and either date of birth or NINO of claimant and  
name and address of PAB, potential appointee or third party in SRTI  
claims

30. When the agent agrees to issue a paper form, the agent must tell the caller they'll have a month to return the form from today's date.

### How to issue a PIP1 Paper Form

31.

Step	Action
<b>NOTE:</b>	Check with the claimant what address they want the paper claim sending to, if this is different from the address on CAMLite create a To Do Task with the new address details on it and note a paper claim form has been requested
1	when in the 'Claimant Record' in PIPCS select 'Contact' tab
2	select 'Communications' from left side navigation panel
3	select the 'New' icon to create a new communication record
4	a 'Record New Communication' window will appear. You must complete all mandatory fields.
5	for Date of Contact this will default to today's date
6	for 'Contact With' select 'Claimant' or 'Recognised Representative', as appropriate
7	for Inbound/Outbound field select 'Outbound'
8	for Channel select 'Correspondence'
9	for Contact Reason select 'New Claim'
10	for Security Questions select 'Not applicable'
11	for Contact Sub-Reason select 'PIP New claim'
12	for notification type select 'PIP.1007'
13	Please note within the comms screen notes field: PIP1 paper form issued Claimant / caller advised to return within one month. CAMLite case resolution 'Pre-Submission'
14	select 'Save'
	The communication record will be automatically updated to show you have issued the PIP.1007. The letter will be automatically generated and issued by PIPCS.

32. PIP 1007 Paper Claim pack will now be issued through the Communication Record screen.

33. The agent will use skills and questions to consider if the claimant would benefit from a visit to help them complete the form.

34. Do you need any help completing the form?

Have you got a friend or member of family that could help?

Do you require large print?

35. The agent will create a 'to do' CAMLite task see: How to create a task and include any information in the notes field.

**Example:**

- Paper claim issued
- Visit required for additional support
- If alternative format is required

Then Wrap up SmartScript

Spare paragraphs 36-43

## **Non mandatory information protecting date of claim**

44. All mandatory information is marked with an asterix. All agents should make every effort to gather all information at the point of call however; Personal Independent Payment (PIP) new claim data gather can be submitted with non-mandatory information missing. Examples of this are when account details are not available at the initial call or the claimant / caller does not have GP details. This list is not exhaustive.

45. Agents should be protecting the Claimants date of claim and still submitting the claim. Once the claim is submitted claimants can ring back on 0345/0845 8503322 with any missing information or this will be gathered through the claim process.

46. When completing the clerical form (PIP1) all agents must ensure the form is completed with all the relevant / requested information.

## **Claimant or Caller needs to break off the call**

47. The claimant / caller says they can't continue and they want to call back to complete the claim.

<b>Step</b>	<b>Action</b>
<b>1</b>	inform the claimant they must call back today to protect the date of the claim (a claim is not made until it is submitted)
<b>2</b>	select 'Save and Exit' from a completed information screen (if the current screen is incomplete select back button to the previous completed screen)
<b>3</b>	read the text to the claimant from the 'Exit' screen and confirm they want the application saved
<b>4</b>	options on the exit page are: <ul style="list-style-type: none"><li>• Save the application and come back to work on it later</li><li>• Exit without saving the application you will not be able to come back to the application</li></ul> as the claimant has advised they will be calling back select save the application and come back to work on it later
<b>5</b>	toggle back to CAMLite using the tab at the bottom left hand corner and complete 'Call Wrap up Smartsript'
<b>6</b>	confirm cases pop-up, select current case resolution of pre-

	submission from the drop down. Select the relevant case status of closed from the drop down list Select 'Ok'
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### Incomplete Data Gather

48. If the claimant / caller does not have all the information to hand and wishes to call back, the agent can 'save' the data gather using the 'Save and Exit' tab. The claimant / caller should be advised to call back as soon as possible because we can only take the claim from the day it is submitted.

Step	Action
1	as the data will not be complete select the 'Back' button to the previous completed page
2	select 'Save and Exit'
3	the Agent will be taken to the Exit screen which will give the following statement: 'We can only take your claim from the date you complete and submit your information. If you delay you could lose benefit'.
4	choose an option: <ul style="list-style-type: none"> <li>• 'Save the application and come back to work on it later'.</li> <li>• 'Exit without saving the application. You will not be able to come back to the application'.</li> </ul>
5	toggle back to 'Siebel Home Page' and select 'Call Wrap up Script'

49. If a Statement of Details is requested following the submission of the PIP New claim, inform the claimant / caller that you will ask the Benefit Centre to send them a copy of the details.

### Multiple Claims on a single call

50. Only one claim can be accepted on a single call. If an agent receives a call where there is more than one PIP claim then the agent must complete all necessary action on one claim and arrange an immediate call back to deal with the other claim.

**Script: "Each call is recorded as evidence of a claim therefore if you want to make a further claim I will immediately call you back once the first claim is submitted".**

51. If the claimant / caller states they cannot complete the claim during the immediate call back advise them to call back at a time that suits them.

Spare paragraphs 52 -60

### Data gather script

#### I want to claim Personal Independence Payment for myself/someone else

61. It is mandatory to select one option before selecting 'Continue'.

The agent / user will not be able to continue until an answer is selected.

Select 'Continue'

Confirm caller wants to claim Personal Independence payment for myself

Confirm caller wants to claim Personal Independence for someone else

## Confirm caller wants to claim Personal Independence Payment for myself

### About you – the Claimant

62. If you are claiming for someone else, tell us about them, not you.

**Note:** personal details maybe pre-populated based on CIS and IDV check, confirm details.

63. If details have not been pre-populated gather details completing all mandatory and non mandatory sections such as title, surname or family name, forename, any other name used for correspondence, any previous surnames, DOB and gender. **NOTE:** Captain, Major and Colonel are also available as a title, **they must not be used** please see: Service Ranks and Decorations

64. A claimant may ask to be known by a different name, this should be recorded in the 'Requested Name' field, see requested name. When a requested name is put into PIPCS any correspondence will be addressed as per the name written within that field, therefore it is **important the title, forename, and surname is written in full** in the 'Requested Name' field, For example:

<b>Title:</b>	Mr
<b>Forename</b>	John
<b>Surname</b>	Smith
<b>Requested Name</b>	Mr John Smith OBE

65. The 'Requested Name' field should be used when a claimant:

- has a title other than Mr, Mrs, Miss, Ms, Dr, Rev, Sir, Lady, Lord, Professor, Dame, Other. **NOTE:** Captain, Major and Colonel are also available as a title, they must not be used please see service ranks and decorations below
- requests a particular style of address for example 'The Warden of St Anne's'
- requests suffixes to be appended to their name for example 'Sir John Smith OBE'
- requests to be known by another name for example 'Miss Mary Brown' to be known as 'Miss Jennifer Brown'. **Note:** using requested name field is not appropriate for shortened versions of a name for example 'Christopher', wants to be known as 'Chris'

### Important Note Service ranks and decorations

66. Should a claimant ask for a requested name to include a military service rank or decoration please advise the claimant;

**Script:** "Due to ongoing terrorist activity in the United Kingdom and overseas, the Ministry of Defence has decided to leave service rank and decorations off all correspondence. They have asked that this



**department do the same. Correspondence from this department will not include any rank or decoration. This has been applied to all British service personnel, retired or not, and also to anyone with military connections."**

67. \* **Gender** drop down options: Male Female \* Gender is a mandatory question. **Note:** CIS will populate the PIP IEG script as male / female and the claimant states otherwise; the agent will leave the pre-populated value as it appears in the IEG script and complete the claim for PIP. After the claim is submitted the agent will create a CAMLite 'To Do' task. See – How to create a task and in the notes field enter the following information: 'Claimant has stated their gender is xxxxxxxx and the pre-populated value is xxxxxxxx.' Continue with the claim.

## **Confirm caller wants to claim Personal Independence Payment for someone else**

68. The Department will not allow a claim to Personal Independence Payment (PIP) unless it is the claimant or an authorised representative, for example Appointee, Power of Attorney or Deputy (Scotland). The two relationship types covered where they may not be legal representatives are: 'I want to be an appointee' (which once selected will be picked up in the back office) and 'I am claiming for the claimant under SRTI'.

69. If a third party contacts the Department to make a PIP New Claim the claimant must be present (unless exceptions apply see below) to establish the claimant's consent to allow the claim to progress. The agent will ask the third party to pass the phone to the claimant and the claimant should confirm they give permission for the third party to act as their voice. They confirm verbally or by pressing the # key and the Identity Verification (IDV) process should be carried out and the Data Gather completed.

- **Exception:** If a third party contacts the Department to make a PIP New Claim and is a potential appointee the claimant does not need to be present, the IDV process does not need to be carried out and the Data Gather is completed.
- **Exception:** If the caller is claiming for the claimant under SRTI the agent will ask if the claimant is present. If the claimant is present the agent will ask the claimant for permission to continue with the claim, and IDV will be conducted. If the claimant is not present IDV is not conducted and the data gather is completed.

70. During the CAMLite inbound call smartscript; the agent is prompted to ask who is calling the department updating the script as either: claimant, recognised rep or unofficial rep.

71. Agents must ask probing questions during the CAMLite inbound call smart script to ensure they know exactly who they are speaking to and to ensure this is logged correctly.

72. If the caller type is marked incorrectly in the CAMLite inbound call smart script, agents should wrap up the call using Case resolution type 'Not Pursued' and immediately call the claimant / caller back to complete the New Claims data gather.

73. If agents only realise the caller type is incorrect once they have accessed the Data Gather in PIPCS agents should exit the Script and wrap up the call as above.

### **Claiming for someone else About you (the caller)**

**If you are SRTI Dedicated Claim Team use this link for additional script**

'Help text' - is available which contains information regarding claiming for someone else. Select this to explain in further detail the meanings of representation. See: Agents, Appointees, Attorneys and Deputies Guide

74. **Script:** 'You have told me you are calling on behalf of ..... I will need to speak to ..... later in the call when I am reading the consent to contact GP or other health professionals and any declarations as part of legislation.

75. When the agent has selected I want to claim Personal Independence Payment for 'someone else' at the beginning of the call they will be taken to 'Claiming for someone else' screen.

76. The agent will advise the caller that they can only make a claim if any of the following drop down options apply:

- Appointee or I want to be an appointee
- Power of Attorney
- Deputy
- Tutor (under Scottish law)
- Curator bonis or judicial factor (under Scottish law)
- Guardian (under Scottish law)
- Corporate Personal Acting Body or Corporate Appointee
- I'm claiming for them under the special rules for terminally ill people

77. Once the agent has established the caller relationship they will be taken to the relevant 'Claiming for someone else' screen.

78. Why are you claiming for them?

- Appointee or I want to be an appointee
- Power of Attorney
- Deputy
- Tutor
- Curator bonis / judicial factor
- Guardian

79. You will use this screen to take the details of the person who is making the call on behalf of the claimant.

80. Why are you claiming for them?

- Corporate Personal Acting Body (CPAB)
- Corporate Appointee

81. You will use this screen to take the details of the person who is making the call on behalf of the claimant. A Corporate PAB will only be asked for their title, surname, first name and the name of their organisation.

82. Why are you claiming for them?

- I am claiming for them under the special rules for terminally ill people

83. The following text will display which the agent should read from the screen to the claimant / caller:

'Thank you for claiming Personal Independence Payment for this person. You may wish to tell (claimants name) that you've claimed Personal Independence

Payment on their behalf. This is because we will send letters about Personal Independence Payment to them'. **Note:** If the caller is concerned for example that we may tell the claimant they are terminally ill, advise the caller; 'I would like to assure you that there is no mention of terminal illness or the special rules in our notifications but the law says we must send letters about Personal Independence Payment to the person themselves. '

84. If a third party is claiming for someone under SRTI, it is mandatory to provide an address

### **Your address that is the address of the PAB**

85. For address details in data gather you do not have to ask if they live in England, Northern Ireland, Scotland or Wales – select 'yes' from the drop down options unless told otherwise. Enter the number or the name of the property and the postcode. If the postcode is not known see link: Find a Postcode. Select 'Continue'.

### **Search results**

86. Results from QAS will be shown here. All potential matching addresses will be selectable. Ask the appointee to confirm the address before selecting any radio buttons. Select 'Continue'

### **Your address**

87. If QAS locates the address, the address fields will be auto-populated. Use the first line if you want to add a house name, letter box or flat number. Please check the address and if it requires changing then type over the existing information.

88. If the postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. The telephony agent can use the Royal Mail Postcode Finder if a caller is unable to provide a postcode. See link: Find a Postcode if still unable to find a postcode create a CAMLite 'To Do' Task, see: How to create a task and note details of the address. Appointee will also be asked 'can we write to you at this address?' Drop down options:

- Yes
- No

Select 'Continue'

### **Correspondence address – the address we can write to**

89. If the appointee has chosen no to 'can we write to you at this address' you will ask them to provide a correspondence address. **See:** Your address that is the address of the PAB. **NOTE: Do not select 'Great Britain'.**

90. Claimants will also be asked again to provide a number or name of the property. If the postcode is not known see link: Find a Postcode Select 'Continue'.

### **Search results**

91. Results from QAS will be shown here. All potential matching addresses will be selectable. Ask the appointee to confirm the address before selecting any radio buttons. Select 'Continue'

## Address we can write to

92. If QAS locates the address, the address fields will be auto-populated. Use the first line if you want to add a house name, letter box or flat number. Please check the address and if it requires changing then type over the existing information.

If the postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. The telephony agent can use the Royal Mail Postcode Finder if a caller is unable to provide a postcode. See link: Find a Postcode if still unable to find a postcode create a CAMLite 'To Do' Task, see: How to create a task and note details of the address.

93. Corporate Personal Acting Body (CPAB) address - When 'Corporate Personal Acting Body or Corporate Appointee' is chosen this screen will record title, surname and first name of the caller and will incorporate the name of the organisation. All these details are mandatory to enable you to continue with the claim. **Note:** we do not ask a CPAB for a correspondence address. Select 'Continue'

## Search Results

94. Results from QAS will be shown here. All potential matching addresses will be selectable. Ask the appointee to confirm the address before selecting any radio buttons.

## The Organisation address

95. If QAS locates the address, the address fields will be auto-populated. Use the first line if you want to add a house name, letter box or flat number. Please check the address and if it requires changing then type over the existing information.

If the postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. The telephony agent can use the Royal Mail Postcode Finder if a caller is unable to provide a postcode. See link: Find a Postcode if still unable to find a postcode create a CAMLite 'To Do' Task, see – How to create a task and note details of the address. **Note:** we do not ask a Corporate Personal Acting Body (CPAB) for a correspondence address. Select 'Continue'

## About you contact details

'Help text' – is available.

96. This screen will be displayed after confirming the address screen. Ask for telephone contact details and using the drop down list confirm what type of contact it is:

- Home
- Mobile
- Textphone
- Work

The first number given will be the primary number. Select 'Continue'.

If a mobile number isn't given, then the agent is instructed to ask for a mobile.

When a mobile number is given, if the claimant, a PAB or potential PAB has given the number the agent will read out 'We may use this number to send you text messages to keep you informed of the progress of your PIP claim.' The agent will **not** read out this sentence if the claim is made by 1 a Corporate PAB 2 if the claim is being made under Special rules for terminally ill people (SRTI).

97. 'What is your preferred method of contact, letter or phone?' This question is for Personal Acting Body (PABs), potential PABs and Corporate Personal Acting Body (CPABs). We do not ask these questions of a third party who is claiming for someone under SRTI because we would not be writing to these people. You will be asked to select from the drop down options whether the caller prefers to be contacted by letter or phone?

98. If phone is selected the following text will appear on the screen:

'We'll use this whenever we can but we'll still send some things by post.'

99. If the caller needs communications in another format such as large print, Braille or audio, the list of values available is large print (which is standard size 16), Braille or audio/ other. If the claimant wanted large print but not the standard size 16, then you would need to select audio/other value.

100. If the caller has a Welsh postcode they can request communications in Welsh. Welsh New Claim

101. Access: Working and living abroad – Nationality to complete and submit the Data Gather

## **Claiming for someone else under SRTI**

102. When SRTI is chosen from the drop down options, the agent will need to populate all mandatory fields to enable the claim to continue. Select 'Continue'.

### **Address details**

103. For address details in data gather you do not have to ask if they live in England, Northern Ireland, Scotland or Wales **NOTE: Do not select 'Great Britain'**

104. Select 'yes' from the drop down options unless told otherwise. Enter the number or the name of the property and the postcode. Select 'Continue'

### **Search results**

105. Results from QAS will be shown here. All potential matching addresses will be selectable. Ask the appointee to confirm the address before selecting any radio buttons. Select 'Continue'

### **Address**

106. If QAS locates the address, the address fields will be auto-populated. Use the first line if you want to add a house name, letter box or flat number. Please check the address and if it requires changing then type over the existing information.

If the postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. The telephony agent can use the Royal Mail Postcode

Finder if a caller is unable to provide a postcode. See link: Find a Postcode if still unable to find a postcode create a CAMLite 'To Do' Task, see: How to create a task and note details of the address. Select 'Continue' **Note:** we do not ask a third party who is claiming for someone under SRTI for a correspondence address.

## About you – Contact details

'Help text' – is available.

107. This screen will be displayed after confirming the address screen. Ask for telephone contact details and using the drop down list confirms what type of contact it is:

- Home
- Mobile
- Textphone
- Work

When a mobile number is given, if the claimant, a PAB or potential PAB has given the number the agent will read out 'We may use this number to send you text messages to keep you informed of the progress of your PIP claim.'

The agent will **not** read out this sentence if the claim is made by 1 a Corporate PAB 2 a third party making the claim under Special rules for terminally ill people (SRTI).

108. The first number given will be the primary number.

Select 'Continue'

'What is your preferred method of contact, letter or phone?' This question is for Personal Acting Body (PABs), potential PABs and Corporate Personal Acting Body (CPABs).

109. We do not ask these questions of a third party who is claiming for someone under SRTI because we would not be writing to these people. You will be asked to select from the drop down options whether the caller prefers to be contacted by letter or phone?

110. If phone is selected the following text will appear on the screen:

'We'll use this whenever we can but we'll still send some things by post.'

111. If the caller needs communications in another format such as large print, Braille or audio, the list of values available is:

- Braille
- Audio CD
- Larger font 16

Large print (which is standard size 16) Braille or audio.. If the claimant wanted large print but not the standard size 16, then you would need to select 'Audio' value.

112. If the caller has a Welsh postcode they can request communications in Welsh. See Welsh New Claim

113. Access: Working and living abroad – Nationality to complete and submit the Data Gather

Spare paragraphs 114 - 115

## About you and your address

'Help Text' will need to be selected if the claimant is homeless.

116. If the claimant is homeless, the agent should tick the box next to:  
'If you are homeless or you don't have a permanent address'  
Select 'Continue' and do not ask any further questions on this screen.

117. For all other claimants address details in data gather you do not have to ask if they live in England, Northern Ireland, Scotland or Wales **NOTE: Do not select 'Great Britain'**

118. Select 'Yes' from the drop down options unless told otherwise. Enter the number or the name of the property and the postcode.  
Select 'Continue'.

### **Search results**

119. Results from Quick Address Search (QAS) will be shown here. All potential matching addresses will be selectable. Ask the claimant to confirm the address. Select 'Continue'.

120. If QAS locates the address, the address fields will be auto-populated. Use the first line to add a house name, letter box or flat number. Check the address and if any changes required type over it.

121. If the postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. Confirm if the Department can write to them at this address. Drop down options:

- Yes,
- No

Select 'Continue'

### **Correspondence address – the address we can write to**

**122. There are two reasons for completing this correspondence address screen:**

- If no was selected at the stage where you asked 'can we write to you at this address'?
- If you are homeless or don't have a permanent address box is ticked

123. If the claimant advises that they are a person without an address (PWA) the agent will advise the claimant that they (the claimant) can arrange for letters to be sent to their local Jobcentre Plus Office. The agent will then locate the nearest Jobcentre with the claimant via 'FIND'. The telephony agent enters the address on the IEG script and completes the claim.

124. If the claimant advises that they have no fixed abode (NFA) the agent will ask for a correspondence address. If the claimant gives a correspondence address the agent will enter this on the IEG script and complete the claim.

125. If the claimant cannot give a correspondence address the agent will advise the claimant that they cannot continue with the claim. The agent will inform the claimant that the information will be kept on the system for one calendar month and the claimant can resume the claim when they provide a correspondence address.

126. For address details in data gather you do not have to ask if they live in England, Northern Ireland, Scotland or Wales, **NOTE: Do not select 'Great Britain'**

127. Select 'Yes' from the drop down options unless told otherwise. Enter the number or the name of the correspondence address and the postcode. Select 'Continue'.

### **Search results**

128. Results from QAS will be shown here for the correspondence address. All potential matching addresses will be selectable. Ask the claimant to confirm the address. Select 'Continue'.

### **Address we can write to**

129. If QAS locates the address, the address fields will be auto-populated. Use the first line if you want to add a house name, letter box or flat number. Please check the address and if the claimant needs to change any details please type over it.

130. If QAS does not locate the address a message will display 'Sorry, we could not find your address. Please enter the address below'.

131. Make sure that the correspondence address is completed if 'homeless' or 'doesn't have a permanent address' is selected. Select 'Continue'.

### **Phone number type drop down options**

132. '**Help text**' is available for selecting types of contact and Textphone (for people with speech or hearing difficulties):

- Home
- Mobile
- Text phone
- Work

133. Ask the claimant to give us a number where we can contact or leave a message. Record the phone numbers including the dialling code in the box provided and use the box next to this to enter what type of phone number it is. Only one of each type can be selected, the first number given will be the primary number.

134. Follow the script to ask if there are any other phone numbers we can contact them on and record them in the same way. **Note:** you can only record one of each 'type'.

135. Textphones don't receive text messages from mobile phones. They are for people who cannot speak or hear clearly. Select 'Continue'.

### **Preferred method of contact**

136. Confirm whether the claimant prefers to be contacted by letter or phone? If phone is selected the following text will appear on the screen:

'We'll use this whenever we can but we'll still send some things by post.'

137. Ask the claimant if they need any communication in an alternative format (AF) such as large print, Braille or audio. The List of values available is Braille, Audio CD, Large font (which is standard size16),. If the claimant wanted large print but not the standard size 16, then you would need to select Audio Value. See: Alternative format



138. If the claimant has a Welsh postcode, the claimant can request written communications in Welsh. If a claimant wants to speak in English but wants to have written communication in Welsh the telephony agent will create a CAMLite To Do Task '**claimant wants written communication in Welsh only. NOT VERBAL.**' **Note** for Welsh agents: Welsh agents will ask if they want all comms in Welsh, written only or verbal only. See: Welsh Claimant New Claim

139. If a request is received for AF this will be captured on the PIP1 data gather. Select 'Continue'.

## Working and living abroad Nationality

'**Help text**' available to explain what is meant by leave to remain

140. Confirm the nationality of the claimant; this is a mandatory question for all claimants.

141. If the claimant has confirmed that they are not a British, EEA or Swiss National, ask if their passport or any other documentation from the Home Office states 'no recourse to public funds'. Drop down options:

- Yes
- No
- Don't know

142. If the claimant is unsure where to find this information they can check the inside pages of their passport and documents (this information is held in the 'Help' option).

143. The next question will be to establish what restrictions if any on their right to remain. Drop down options:

- No restrictions
- Limited leave to remain
- Limited leave to remain extension applied for
- Indefinite leave to remain
- No leave to remain
- Don't know

144. If the claimant has told you that they have 'limited leave to remain' you will need to enter the end date in dd/mm/yyyy format.

145. If the claimant has told you that they have applied for an extension you will need to enter the date the claimant applied for this in dd/mm/yyyy format. Select 'Continue'.

146. The date is mandatory. If this date is not known or not complete, the claim cannot proceed. Ask the caller to obtain the full date and call back the same day. Follow the step and action steps as below:

Step	Action
1	as the data will not be complete select the 'Back' button to the previous completed page
2	select 'Save and Exit'
3	the Agent will be taken to the Exit screen which will give the following statement: <ul style="list-style-type: none"><li>• 'We can only take your claim from the date you complete and</li></ul>

	submit your information. If you delay you could lose benefit'.
4	choose an option: <ul style="list-style-type: none"> <li>• 'Save the application and come back to work on it later'</li> <li>• 'Exit without saving the application. You will not be able to come back to the application'</li> </ul>
5	Toggle back to 'Siebel Home Page' and select 'Call Wrap up Script'.

Spare paragraphs 147 -155

## Working and living abroad Residence and Presence

156. From this screen read the following statement:

**Help Text:** 'To be entitled to Personal Independence Payment you normally have to have lived in the United Kingdom (UK) for two years out of the last three. You may be able to meet this condition if you are, or have been, living in another European Economic Area country or Switzerland'. **Note: as from 1st July 2013 Croatia has become part of the EEA** therefore the claim can be taken and no additional questions will be asked.

157. Once the statement has been read ask the claimant which country they normally live in.

Drop down options: List of countries as per Customer Information System (CIS) with England, Northern Ireland, Wales and Scotland listed first.

158. If they state England **do not select 'Great Britain'**

159. The next question will be asked to find out if the claimant has been abroad for more than four weeks at a time out of the last three years. 'By abroad we mean outside Great Britain and Northern Ireland'. Drop down options:

- Yes
- No.

Select 'Continue'.

## Working and living abroad for more than four weeks out of the last three years

'Help text' - available for providing dates of absence in another country.

160. If the claimant has told you that they have been abroad for more than four weeks at a time out of the last three years this screen will appear.

161. The first question is to establish which country they went to.

Drop down options are all countries plus 'other' the drop down options do not include:

- England
- Northern Ireland
- Scotland
- Wales

162. The next question will ask for dates of when the claimant went to this country, the dates will need to be in dd/mm/yyyy. If the claimant doesn't know the exact dates we'll contact them about this, at this stage leave the dates blank and continue with the claim.

163. Ask the claimant the reason for going to this country for that period of time; this is mandatory and will require an answer.

Drop down options:

- Holiday
- Medical treatment
- A member of Her Majesty's Forces or a family member of a person serving in Her Majesty's Forces
- Aircraft worker
- Mariner
- Continental Shelf Operative
- Employed or business abroad or family member of someone employed or on business abroad
- Employed with a UK based employer or family member of someone employed with a UK based employer
- Employed with a foreign employer or family member of a person employed with a foreign employer
- UK Civil Servant or family member of a UK Civil Servant
- Living abroad
- Other

164. Confirm 'when you went away did you intend to return?'

This doesn't display if the reason is 'holiday'

Drop down options:

- Yes
- No.

165. Confirm with the claimant if they have had more than one period of more than four weeks at a time abroad, if 'Yes', the questions are asked again.

Drop down options:

- Yes
- No.

166. If the answer is 'Yes' the following boxes will appear again to record the information:

- When did you go?
- Why did you go?
- Where did you go?
- When you went away did you intend to return?

167. This information can be recorded as many times as necessary depending on the answers. Select 'Continue'.

168. **IMPORTANT NOTE:** Where periods abroad totalling more than one year within the last three years are recorded, some claims are being disallowed inappropriately. To stop this happening, a workaround has been put in place. When a claimant answers 'Yes' to the question 'have you spent any periods abroad?' you must always select 'Yes' in response to the next question 'Are you, or is a family member, receiving any pensions or benefits from another European Economic Area country or Switzerland' regardless of the answer and create a To Do task. See working and living abroad any other income

## Working and living abroad any other income

'Help text' - available to provide a list of EEA countries.

169. This screen is used to record if the claimant is receiving any income from, or if they work, outside Great Britain and Northern Ireland.**Help Text:** 'We need to know if you receive any income from, or work outside Great Britain and Northern Ireland because we need to check if another European Economic Area country is responsible for paying benefit'.

170. Ask the following questions which are mandatory:

171. 'Are you, or is a family member, receiving any pensions or benefits from another European Economic Area country or Switzerland'? Drop down options:

- Yes
- No
- Don't know

**NOTE:** if the claimant answered 'Yes' to the previous question 'have you spent any periods abroad?' **you must select 'Yes'** for this question (whether the claimant or family member is receiving foreign benefit) regardless of the actual response to this question. **REMEMBER** if the claimant's answer to the foreign benefits question was actually 'No or Don't Know' select 'Yes' and create a To Do task. In the notes field write 'Residence and Presence workaround. Receiving foreign benefits, no or don't know'.

172. There is further text to explain what is meant by a family member and also to advise the claimant that they can check any letters from where they've worked or ask family members about this.

173. 'Are you, or is a family member working or paying insurance to another European Economic Area country or Switzerland'? Drop down options:

- Yes
- No
- Don't know

174. There is further text to explain what we mean by insurance. We mean insurance connected to your work, like UK National Insurance. We don't mean insurances like holiday insurance, travel insurance or motor insurance. Select 'Continue'

## About being in hospital or hospice

**If you are SRTI Dedicated Claim Team use this link for additional script**

175. Advise the claimant that if they are in any of the following places, hospital or a hospice, care home, nursing home, sheltered housing, residential college or a hostel when they claim, it may effect when and what we can pay them. Even if they live in any of the following places they should still claim PIP. We can then decide if any PIP can be paid and from when.

176. Confirm if the claimant is in hospital as an in-patient on the day they make the claim. Drop down options:

- Yes
- No

177. If they are in hospital 'today' confirm if they were in hospital 'yesterday'.

**Note:** this question only appears if the answer to 'Are you in hospital today' is 'Yes'. Drop down options:

- Yes
- No

178. If the claimant has confirmed they are in hospital the day they have made the claim confirm if they are a private patient paying all their own costs? Drop down options:

- Yes
- No
- Don't know

If the claimant states that they are or have been in hospital you will be taken to 'Please tell us the name and address of this place'.

### **Please tell us the name and address of this place**

179. Enter the number or name of the property and the postcode if known. If the claimant doesn't know the postcode make sure you check the box for 'I don't know the postcode'.

180. Enter the number or name of the property and the postcode then select 'Continue'

181. If QAS finds multiple addresses please select the address and select 'Continue'

182. QAS finds the address; the address fields will be auto-populated.

Use the first line if you want to add a property name, letter box or flat number. If you want to change it please type over it.

183. If the Postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. The telephony agent can use the Royal Mail Postcode Finder if a caller is unable to provide a postcode. See: Find a Postcode if still unable to find a postcode create a CAMLite 'To Do' Task. See: How to create a task and note details of the address. Select 'Continue'

Spare paragraphs 184 - 201

### **About being in a care or nursing home sheltered housing residential college or hostel**

#### **These questions are asked if the claimant is not in a hospital or hospice today**

202. Ask the claimant if they are living in a care home, nursing home, sheltered housing, residential college or a hostel. Drop down options:

- Yes
- No

203. Confirm what type of accommodation they are living in. Drop down options:

- Care home
- Nursing home
- Sheltered housing
- Residential college
- Hostel

204. Confirm if they were living in this place yesterday? Drop down options:

- Yes
- No

205. If the answer is yes we will use Quick Search Address (QAS) for the address but there must be an option. Put the name and number of the property and postcode fields on this screen to invoke QAS. If the postcode is unknown skip QAS. Select 'Continue'.

206. If QAS finds multiple addresses please select the address. Select 'Continue'.

207. QAS finds the address; the address fields will be auto-populated. Use the first line if you want to add a property name, letter box or flat number. If you want to change it please type over it.

208. If the postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. The telephony agent can use the Royal Mail Postcode Finder if a caller is unable to provide a postcode. See link: Find a Postcode if still unable to find a postcode create a CAMLite 'To Do' Task. See: How to create a task and note details of the address. Select 'Continue'.

**Are you paying all of the costs for your stay without help from a local authority, Jobcentre Plus, or a charity - if they are in a Care home, Nursing home, Sheltered housing, Residential college, Hostel**

**'Help text'** - available to give advice on paying all the costs.

209. If the claimant lives in Great Britain and has declared they live in a Care home, nursing home, sheltered housing, residential college or a hostel complete this screen.

210. 'Are you paying all of the costs for your stay without help from a local authority, Jobcentre Plus, or a charity'? Drop down options:

- Yes
- No
- Don't know

211. 'Who is paying'? Drop down fields:

- Local authority
- Health authority
- Local education authority
- Jobcentre Plus
- A charity

212. 'What is the name of the authority or charity'? Not asked if Jobcentre Plus. You will need to put this in by free-text. **Note:** if the claimant doesn't know the answers write 'don't know' in the free-text box to allow the claim to continue.

213. 'Do you have an agreement with the local authority to repay any of the costs'? Only asked if local authority is paying. Drop down options:

- Yes
- No
- Don't know

**Please tell us the name and address of this place**

214. Enter the number or name of the property and the postcode if known then select 'Continue'. If the claimant doesn't know the postcode make sure you check the box for 'I don't know the postcode'.

## **Search results**

215. Results from QAS will be shown here. All potential matching addresses will be selectable. Ask the claimant / appointee to confirm the address before selecting any radio buttons.

## **Address**

216. If quick search address (QAS) finds the address, the address fields will be auto-populated. Use the first line if you want to add a property name, letter box or flat number. Please check the address. If you want to change it please type over it.

217. If the postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. The telephony agent can use the Royal Mail Postcode Finder if a caller is unable to provide a postcode. See link: Find a Postcode if still unable to find a postcode create a CAMLite 'To Do' Task. See: How to create a task and note details of the address

218. The postcode is not mandatory at this stage.

## **Medical information**

### **If you are SRTI Dedicated Claim Team use this link for additional script**

219. We have Special Rules for Terminally Ill (SRTI) people making a claim to PIP; it is for claimants with a progressive disease who are not expected to live for longer than six months. Claims will be fast tracked so decisions and payment, where appropriate, will be issued promptly although timescales should not be given.

220. The claimant will be asked to obtain a DS1500 medical report from their doctor to support the claim they can send it to us at:

**FREEPOST RTEU-HXBG-YTST**

**Personal Independence Payment 10**

**Mail Handling Site A**

**Wolverhampton**

**WV98 1AE**

221. The Assessment Provider's (AP) Health Professional (HP) gives advice on this.

222. This question is mandatory. 'Are you claiming under SRTI'? Drop down options:

- Yes
- No

223. 'What is your illness'?

224. 'Which Healthcare Professional can best tell us about your illness or health condition and how it affects you'? This is mandatory if the claimant is making the claim under SRTI. This is not mandatory if the claimant has answered no to the special rules. If the claimant sees more than one Health or Social Care Professional we'll ask for more information in the next stage of the claiming process. Drop down options:

- GP
- Hospital Doctor

- Specialist Nurse

225. 'What is their name'? You will need to enter this by free text and make sure that all spellings are correct. **NOTE:** their full name must be more than 3 characters long, if it is 3 characters or less include their title, for example Dr, Mr, Mrs and make sure that the spellings are correct.

### **Please tell us the address of the surgery, hospital or place they work**

'Help text' - available to give advice on providing an address for a Healthcare Professional.

226. If the claimant has difficulties giving this information advise them that they can find the address on letters from their GP or the hospital. Don't worry if the claimant doesn't know as you will be able to continue with the claim. Enter the number or name of the property and the postcode and select 'Continue'.

227. If the claimant doesn't know the postcode make sure you check the box for 'I don't know the postcode'.

### **Search results**

228. Results from QAS will be shown here. All potential matching addresses will be selectable. Ask the claimant / appointee to confirm the address before selecting any radio buttons.

### **Address**

229. If quick search address (QAS) finds the address, the address fields will be auto-populated. Use the first line if you want to add a property name, letter box or flat number. Check the address. If you want to change it please type over it.

230. If the postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. The telephony agent can use the Royal Mail Postcode Finder if a caller is unable to provide a postcode. See link: Find a Postcode if still unable to find a postcode create a CAMLite 'To Do' Task. See: How to create a task and note details of the address

231. The postcode is not mandatory at this stage.

### **Is there another Health or Social Care Professional or someone else we can contact who can tell us about your illness?**

232. Complete this screen for claimants making a claim under SRTI. 'Is there another Health or Social Care Professional or someone else we can contact who can tell us about your illness'? Drop down options:

- Hospital Doctor or Consultant
- GP
- Specialist Nurse
- Family member
- Carer
- Friend

233. If there is take their name ensuring all spelling is correct.



Take details of the address by entering the number or name of the property and the postcode if known. If the claimant doesn't know the postcode make sure you check the box for 'I don't know the postcode'.

### Search results

234. Results from QAS will be shown here. All potential matching addresses will be selectable. Ask the claimant / appointee to confirm the address before selecting any radio buttons.

### Address

235. If quick search address (QAS) finds the address, the address fields will be auto-populated. Use the first line if you want to add a property name, letter box or flat number. Check the address. If you want to change it please type over it.

236. If the postcode was unknown QAS will not display any matching addresses instead an error message will display advising the address details must be entered manually. The telephony agent can use the Royal Mail Postcode Finder if a caller is unable to provide a postcode. See link: Find a Postcode if still unable to find a postcode create a CAMLite 'To Do' Task See: How to create a task and note details of the address

237. The postcode is not mandatory at this stage. Select 'Continue'.

### What we want you to do with a DS1500

238. Inform Claimants; 'It's important you send us a DS1500 form to support your claim if you have not sent one for this or any other benefit in the last six months'.

239. The DS1500 is a report about their medical condition. Claimants won't have to pay for it. Claimants can ask the doctor's receptionist, a nurse or a social worker or a Macmillan nurse to arrange it for them. Claimants don't have to see the doctor. **Note: The agents need to advise that the request to claim under SRTI can be dealt with more quickly if the DS1500 form is completed and returned as soon as possible. "It will be helpful if you send this to us within 5 days."**

240. **Note:** As a Macmillan Nurse is registered as a contact if they have made the claim on behalf of the claimant and are not a representative, they will not automatically get a copy of the notification.

**Script:** if details of the decision are requested in these circumstances:

'The notification will go out to the claimant, as you are not an official rep we cannot issue a copy of the Personal Independence Payment decision notification'.

241. Question 'Are you going to send us a DS1500 to support your claim'?

Drop down options:

- Yes
- No
- Don't know

Select 'Continue'

Spare paragraphs 242 - 250

### Reassessment re use DLA medical evidence

## Using DLA evidence Agent Supporting Narrative

251. When taking a reassessment new claim for PIP, agents will read the script to the claimant at the medical evidence stage to ascertain if they would like to re use any DLA medical evidence. **NOTE:** If the claimant is SRTI we will not be able to re use DLA medical evidence due to timescales. For more information on what we mean by DLA medical evidence see re use DLA medical evidence

Step	Action
1	<p><b>NOTE:</b> If the claimant is SRTI we will not be able to use medical evidence due to timescales</p> <p>advise the claimant;  <b>“Personal Independence Payment’ (PIP) is a new benefit. Once you complete a claim over the phone (<i>In writing if paper claim requested</i>) you will receive a ‘How your disability affects you’ PIP2 form to complete. When you return the PIP2 you can include any medical or supporting evidence you think may help us. You will then be referred to an Assessment Provider who may gather further medical evidence</b></p> <p><b>Is there any other specific medical evidence from your DLA claim that you think might help?”</b> see what is DLA medical evidence</p> <p>if no go to step to 2  if yes go to step 3</p>
2	<p>if no specific medical evidence advise claimant;  <b>“That’s fine any necessary evidence will be obtained”</b></p> <p>continue with the PIP claim</p>
3	<p>if yes there is specific medical evidence ask the claimant;  <b>“Do you know what that evidence was when it was obtained?”</b>  see what is DLA medical evidence</p> <p>they may respond in various ways:  if claimant provides specific DLA medical evidence details go to step 4</p> <p>if claimant does not know specific DLA medial evidence go to step 5</p> <p>if claimant wants to reuse all DLA medical evidence go to step 6</p> <p>if claimant wants a copy of all DLA medical evidence go to step 7</p>
4	<p>claimant provides specific DLA medical evidence advise claimant;  <b>“We can obtain your DLA file and ensure this medical evidence is taken into account. Due to requirements under the Data Protection Act and our document retention procedures,</b></p>

	<p><b>previous evidence may not be available. If evidence is still on your file we will ensure that it is taken into account.”</b></p> <p>note the details of the specific DLA medical evidence and continue with the claim, once the claim is submitted create a CAMLite ‘To do’ task with the details of the specific DLA medical evidence in the notes field, see: How to create a task</p>
5	<p>claimant does not know specific DLA medical evidence advise  <b>“Unfortunately we need you to tell us what evidence you want us to use or if you can’t please be assured once we receive your PIP2 form we will obtain any evidence that is required to make your PIP decision”</b> continue with the claim</p> <p><b>note:</b> the claimant may ask for all DLA medical evidence to be used; got to step 6, or wish to see copies of DLA medical evidence; go to step 7</p>
6	<p>claimant wants to reuse DLA medical evidence advise claimant;  <b>“We will call your DLA file and ensure the medical evidence is taken into account. Due to requirements under the Data Protection Act and our document retention procedures, previous evidence may not be available. If evidence is still on your file we will ensure that it is taken into account.”</b></p> <p>continue with the claim, once the claim is submitted create a CAMLite ‘To do’ task to advise that all medical evidence in the DLA file to be used, see: How to create a task</p>
7	<p>claimant wants a copy of all their DLA medical evidence advise claimant;  <b>“We can send you a copy of the medical evidence we have on your DLA file. Due to requirements under the Data Protection Act and our document retention procedures, previous evidence may not be available. If evidence is still on your file we will ensure that it is taken into account. On the covering letter we send you with the copy of your DLA medical evidence you will be given a date by which you must let us know if you want to use any of the information for your Personal Independence claim.”</b></p> <p>continue with the claim, once the claim is submitted create a CAMLite ‘To do’ task to advise that claimant requests copy of all DLA medical evidence on, see: How to create a task</p>

## Going out and moving around

252. Mobility questions are only asked for SRTI. Using the script advise the claimant that they may get the mobility component of Personal Independence Payment if they have difficulty moving or need help to get around.

253. There are four mandatory questions within this section that need to be answered if the claimant is claiming under the special rules.

### Question 1

254. 'Do you need someone else to plan any journey for you that you wish to take'?

**Note:** this means working out a route to another place, whether they need directions to the local shops, working out how to use public transport to get somewhere familiar or to a location you don't know very well. For further information see: Question 1 Drop down options:

- Yes
- No
- Sometimes

### Question 2

255. 'Do you have difficulties following the route of a familiar journey'? For example do you need?

- another person with you
- an assistance dog or
- aids such as a white stick

**Note:** This means needing to use an aid or to have somebody with you because you may lose your way outdoors, even if it is somewhere you know well. For further information see: Question 2 Drop down options:

- Yes
- No
- Sometimes

### Question 3

256. 'Do you have difficulty walking short distances of up to 50 metres'? This is about the length of five buses. For further information see: Question 3 Drop down options:

- Yes
- No
- Sometimes

### Question 4

257. 'Do you have difficulty walking short distances of up to 20 metres'? This is about the length of two buses. For further information see: Question 4 Drop down options:

- Yes
- No
- Sometimes

258. If the claimant / third party doesn't know the answer to a mobility question, Select 'Sometimes'. Select 'Continue'.

259. **Note:** If the claimant / third party cannot answer the mobility questions with either 'Yes' 'No' 'Sometimes' and they don't know, the agent will create a 'To Do' task to advise to update the medical evidence screen comments box with a note to say the caller did not know the mobility questions.

## Consent to contact your GP or the people or organisations involved with you

260. 'We may want to get information about your health condition or disability and how it affects you when we deal with:

- your claim for Personal Independence Payment
- any request to reconsider or appeal a decision about your claim.

261. The agent must read out the information from the screen as this is a legal statement. Drop down options:

- Yes
- No

This is mandatory and does require either a 'Yes' or 'No' answer.

## How we pay you

'Help text' available giving further information on payments.

262. Read the statement on the screen as follows:

**"We ask for your account details before we decide on a claim so we can pay you straight away if you qualify for benefit. This doesn't guarantee you'll get Personal Independence Payment".**

263. **"Can you give us your account details now? By account we mean bank, building society, credit union, or Post Office card account."** Drop down options:

- Yes
- No

264. Claimants response is 'no' a message will display stating 'We'll contact you about this'. Select continue and this will take you to 'additional support'.

## Reassessment claimant

265. If the reassessment claimant does not have their bank details to hand during the call, with the claimant's permission, the agent can create a CAMLite To Do task to transpose the bank details held for their DLA payments.

Advise claimant:

**"We may currently pay your DLA payments into a bank account, would you like the department to use the same bank details for your PIP claim?"**

If 'Yes' advise;

**"Please be aware that once a decision has been given following your claim to PIP we will use these details to make any PIP payments due."**

Create a CAMLite To Do Task and note 'claimant agrees we can use bank account details held in DLACS'

If 'No' advise;

**"We will contact you shortly to obtain your preferred bank details."**

266. Finding out how much we've paid into the account

**"You can check your payments on account statements. The statements may show your National Insurance (NI) number next to any payments we've made. If you think a payment is wrong, get in touch with the office that pays you straight away".**

267. If we pay you too much money

**“We have the right to take back any money we pay that you’re not entitled to. This may be because of the way the payment systems work. For example, you may give us some information which means you’re entitled to less money. Sometimes we may not be able to change the amount we’ve already paid you. This means we’ll have paid you money that you’re not entitled to. We’ll contact you before we take back any money.”** Then select ‘Continue’.

**Note:** The agent does not read out: ‘Finding out how much we’ve paid into the account’ or ‘If we pay you too much money’. These statements have been removed from the script. The screens will be updated at a future date.

## **How we pay you account details**

268. Enter the sort code, account number, building society roll or reference number, if they have one. If they tell you the wrong account details their payment may be delayed or they may lose their money.

269. The name of the account holder will need to be recorded exactly as it is shown on the debit card, chequebook or statement.

270. Confirm what type of account it is, drop down options:

- Default to UK account
- If the claimant is living outside the UK they can choose to have their benefit paid directly into a UK account or an overseas account
- Enter the sort code
- Account number
- Building Society roll or reference number – if Claimants are using a building society account they may need to tell us a roll or reference number. This may be a mix of letters and numbers, and may be up to eighteen characters long.

271. The system / Bank Wizard will try and validate this information. Select ‘Continue’

272. This screen will only appear if incorrect details given in Bank Wizard select the ‘Back’ button and check the details and then select ‘Continue’.

273. If the claimant has an overseas account: select account type ‘Overseas’. The agent will be asked to input the **International Bank Account number (IBAN)**. The IBAN is a mix of letters and numbers. The claimant can find the IBAN on their statement.

274. **Bank Identification code (Swift BIC)**, the claimant can usually find the Swift BIC on their statement. If the Swift BIC is not on their statement, they will need to contact their bank for help. The claimant will be contacted again for their account details.

275. Once the claimant has provided their bank details it’s important that all the information is recorded accurately. If the Claimant gives the wrong account details their payment may be delayed or they may lose their money.

## **Additional support**

276. The additional support section does not display if:

- the claim is being made under SRTI
- the claim is being made by a PAB / third party

Do not use the data gather script see Additional Support Script 277. There are three specific questions. The second and third questions only appear in certain circumstances. If the answer to the first question is 'No' or 'Don't know', the second question appears. If the answer to the second question is 'Don't know', the third question will appear **NOTE: the third question has now been dropped from the data gather script.** When you ask each question select from drop down options:

- Yes
- No
- Don't know

278. If the answer is 'Yes', this will automatically flag 'Potential additional support required'. If the answer is 'No' or 'Don't know' select Help to display the text to give a list of explanations related to the question. **NOTE:** there has been a change to the script that does not show on the data gather script, '**It could mean anxiety or depression**' has been replaced with '**It could mean severe depression**' see Additional Support Script

279. It is mandatory to answer the question if it is asked. Remember to adapt the conversation to the needs of the individual repeating any information where necessary. See: Vulnerable claimants. Advise the claimant if they think they will need any help or support with completing the form to contact a local support organisation as soon as possible to arrange help.

280. Some claimants have disabilities / current circumstances that may need extra personal support or adjustments to enable them to access services. The agent's experience of dealing with claimants will inform an opinion but they will ensure this is based on behavioural evidence, which shows the claimant is unlikely to be able to use self help services.

281. If the claimant has answered the additional support questions in such a way as to input a 'No' in the 'additional support identified' field, but the agent identifies that the claimant is displaying signs which suggests they should be treated as needing additional support, the agent should not alter the answers given by the claimant. The agent should raise a CAMLite 'To Do' task (see: How to create a task) for the back office to change the additional support identified field to 'Yes'. Reasons must be provided in the 'Notes' field to explain why they are asking for this to be changed.

282. If the claimant confirms they may need help filling in the PIP2 form agents can take the details of the 'informal contact' that will be helping them to complete the form. The agent will clerically write down the details then when the data gather has been submitted they will access PIPCS Claimant Homepage, and add the informal contact details see step 6 see Additional Support Script

## Summary

284. A summary of all the information captured in the call will display. This does not need to be read back to the claimant. If you have been informed of any changes during the claim you can make any changes at this stage. A statement of details will not be issued to the claimant. Select 'Continue'

Spare paragraphs 285 - 289

## Declaration

**'Help text'** available.

290. The declaration is a legal statement and must be read in full.

**Script: "You declare that the information you have given is correct and complete as far as you know and believe.**

**You understand that if you knowingly give false information, your benefit may be stopped and you may be liable to prosecution or other action.**

**You understand that you must promptly tell the office that pays your Personal Independence Payment of anything that may affect your entitlement to, or the amount of, that benefit.**

**You understand that the Department for Work and Pensions may use the information which it has now or may get in the future to decide whether you are entitled to:**

- **the benefit you are claiming**
- **any other benefit you have claimed**
- **any other benefit you may claim or be awarded in the future**

**This is your claim for Personal Independence Payment.**

Once the claimant agrees check the box and select 'Continue'.

291. If the claimant does not agree with the declaration the claim can't be submitted. Select 'continue'

## **Submit application**

292. Data Gather is completed and the Personal Independence Payment Part 1 (PIP Pt1) has been submitted. Wrap up SmartScript

293. If a Statement of Details is requested following the submission of the PIP New claim, inform the caller/claimant that you will ask the Benefit Centre to send them a copy of the details. The agent will create a CAMLite 'To Do' task, see: How to create a task and in the 'Notes' field enter the reason 'Statement of Details' requested.

## **Thank you**

294. This screen will explain what happens next, it provides details of where claimants / callers can get further information regarding their claim. The agent must ensure that the claimant / caller has a pen or, if using a Dictaphone has time to set this in place. Agents need to advise the claimant of the following:

295. **Note:** For claimants / 3<sup>rd</sup> parties making a claim for PIP under SRTI please only advise of the first bullet point, for all other claims advise as from the following (if) relevant bullet points“.

- **We may contact you for more information to support your claim**
- **We may send you a form to complete, called a PIP 2 'How your disability affects you', so you can tell us how your condition affects you. It is important you complete the form with as much information as possible and send it back to us. If you don't return the form in time then your claim to PIP may be disallowed. We may refer you for an assessment with an independent health professional to help DWP work out the level of help you need after you send back the PIP2 'How your disability affects you' form.**



**Note:** If claimant queries the timescale for hearing from the Assessment Provider:

- **Once we receive your 'How your disability affects you' form and any evidence or information you provide, we send it to the assessment provider who completes PIP consultations on behalf of DWP. The assessment provider will contact you if they need to clarify information about your condition or you need to attend a face-to-face consultation. Our current estimate is that it can take between 12-16 weeks to arrange your appointment. It may take less time than this or longer, for example if an appointment has to be re-arranged.**

Select 'Continue'.

## **REMEMBER To Do Tasks following data gather**

296. Remember to complete additional CAMLite To Do tasks if appropriate:

- If gender discrepancy See: link to gender
- Details of communicating in Welsh, if verbal English and written in Welsh See: preferred method of contact
- Details of mobility answers if 'don't know' and SRTI See: going out and moving about
- Details of See: re use of DLA medical evidence see link to
- Request to consider reinstatement of DLA if new claim is following termination of DLA see link to reinstatement of DLA
- Details reassessment claimant and no bank details, permission to use information on DLACS see How we pay you
- Claimant displaying signs of needing 'additional support' but answered 'No' to the question see additional support
- Informal Contact record these details on PIPCS see additional support step 6
- Statement of Details requested following the submission of the PIP New claim, inform the claimant / caller that you will ask the Benefit Centre to send them a copy of the details

Spare paragraphs 297 -302

## **Information on mobility questions for SRTI claims**

303. Examples have been provided when taking a new claim to PIP to give a better understanding of the Mobility component descriptors. This will help agents to handle SRTI calls more confidently.

304. For each question in 'Going out and moving around' there will be a link to the relevant example.

### **Question 1 Do you need someone else to plan any journey for you that you wish to take?**

305. By journey, we mean a local journey and it includes getting to a location that isn't familiar to you using public transport.

306. Do you need someone to work out the route for you, which bus you need to get, or what time to get it?

### **Q1 Example**

307. Jane walks by herself to the local shops and back. She also gets the bus to the doctor's surgery on her own. She can go on her own if her appointment is around the same time. If she is given a later appointment, she can't work out what time she needs to get the bus and her sister has to plan it for her and tell her what time to leave the house to get to the bus stop.

308. Jane has not been to her local library before. If she wanted to go, she would need her sister to plan the route for her, including which bus to get, what time to get the bus and where to get off.

309. Jane therefore needs someone else to plan a journey and the answer to question 1 should be yes.

### **Question 2 Do you have difficulties following the route of a familiar journey?**

310. For example do you need?

- aids, such as a white stick.
- another person with you
- or an assistance dog

311. A familiar journey is somewhere local that you've been to a few times before.

312. Do you need someone with you to make sure you are safe? For example, to help you cross any roads?

313. Do you need someone with you to make sure you are safe? For example, to help you cross any roads?

### **Q2a Example – needs aids**

314. Peter is visually impaired. He knows his route to work, to the supermarket, to the gym and other places he goes to frequently. He uses a long cane when he is outdoors to help him find his way.

315. Peter therefore needs an aid to follow the route of a familiar journey and his answer to question 2 should be yes.

### **Q2b Example – needs another person**

316. Samantha has learning difficulties. She is physically able to get around and can remember how to get to a few simple places such as the local shop and her friend's house, but she lacks an awareness of danger. If she went out on her own, Samantha might put herself in danger, for example she has previously stepped out into busy traffic when her mother wasn't watching.

317. To ensure her safety, Samantha therefore needs assistance from another person to follow the route of a familiar journey and her answer to question 2 should be yes.

### **Question 3 Do you have difficulty walking short distances up to 50 metres?**

320. The answer to this should be 'Yes' if the claimant says they can walk the distance but:

- they are in a lot of pain;
- they are very breathless;
- they can't repeat it as often as they would like to; or

- it would take them a long time to walk that distance

321. If you are not sure whether any of the above applies, for example, if you are not sure what the claimant means by 'a long time', you should mark the answer as 'Yes'. The Health Professional will then investigate further.

### **Q3 example difficulty with 50 metres no difficulty with 20 metres**

322. As a result of his treatment, John becomes very tired following any physical activity. He can repeatedly walk a short distance, for example between his house and the car which is around 15 metres. He can also walk longer distances over 50 metres or more – for example he can manage to walk round the supermarket to get a small basket of shopping, but after doing so he is so tired he cannot walk more than the short distance between the car and the house again that day.

323. John therefore has difficulty walking distances up to 50 metres but does not have difficulties walking distances up to 20 metres. His answer to question 3 should be yes, but his answer to question 4 should be no.

### **Question 4 Do you have difficulty walking short distances up to 20 metres?**

324. The answer to these questions should be 'Yes' if the claimant says they can walk the distance but:

- they are in a lot of pain;
- they are very breathless;
- they can't repeat it as often as they would like to; or
- it would take them a long time to walk that distance

325. If you are not sure whether any of the above apply, e.g. if you are not sure what the claimant means by 'a long time', you should mark the answer as 'Yes'. The Health Professional will then investigate further.

### **Q4 Example difficulty with 50 metres and 20 metres**

326. Patrick can stand and walk a few steps using two walking sticks. He sometimes uses his sticks to move between rooms in his flat – for example, between the bedroom and living room – but it causes him a lot of pain and he cannot repeat it more than a few times a day. When he is indoors he generally stays in one room as much as possible. He has a manual wheelchair which he uses when outdoors. When he needs to go out, Patrick uses his sticks to stand and transfer into his wheelchair. He is unable to self-propel his wheelchair very far and his wife usually pushes him.

Patrick therefore has difficult walking distances up to 50 and 20 metres and his answer to questions 3 & 4 should be yes.