

PIP34 Management Checks

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Contents

Contents	2
How to Use This Handbook	4
<i>Learner prerequisites</i>	<i>4</i>
<i>Supervisor and mentor's roles</i>	<i>4</i>
Module Aims and Objectives	5
Topic 01 – Introduction to Management Checks	6
<i>What Happens When a Management Check is Generated</i>	<i>8</i>
<i>Is The Management Check For Your Member of Staff</i>	<i>9</i>
<i>Is a Quality Check Appropriate?</i>	<i>10</i>
<i>Quality Check is Needed</i>	<i>11</i>
<i>Reserving a Management Check Task.....</i>	<i>12</i>
<i>Management Check Task Reserved in Error.....</i>	<i>13</i>
Topic 02 – Submitted Case Management Check	14
<i>Checks to Complete Prior to Clearing the Management Check.....</i>	<i>15</i>
<i>Approving The Management Check</i>	<i>21</i>
<i>Rejecting The Management Check.....</i>	<i>22</i>
Topic 03 – Evidence Approval Management Check	23
<i>Approving the Management Check.....</i>	<i>24</i>
Topic 04 – Payment Correction Case Management Check.....	27
<i>Overpaid Case.....</i>	<i>27</i>
<i>Underpaid Case.....</i>	<i>28</i>
Topic 05 – Amending Bank Account Details	30
Topic 06 – High Value Payment Management Check	32
<i>Approving The Check</i>	<i>33</i>
<i>Rejecting The Check</i>	<i>33</i>
Topic 07 – Setting a Management Check Profile	35
<i>Creating a Case Approval Check.....</i>	<i>35</i>

<i>Simulation – Setting a Management Check Profile.....</i>	<i>37</i>
<i>Modifying a Case Approval Check.....</i>	<i>38</i>
<i>Simulation – Editing a Case Approval Check</i>	<i>38</i>
<i>Deleting a Case Approval Check.....</i>	<i>39</i>
<i>Simulation – Deleting an Existing Case Approval Check.....</i>	<i>39</i>
Module Summary.....	41
Appendix 01 Additional Information on QAF Checks.....	42

How to Use This Handbook

This handbook is to help you, the learner, with both new learning and/or to consolidate learning already received. It includes appropriate information and, in certain cases, practice with the help of a mentor in the workplace.

The running order of the handbook is designed to flow in a logical way. You are free to change the order but you must cover all the topics.

Use the handbook as a learning pack. It does not replace any guides or circulars on the subject.

Learner prerequisites

Before completing this learning, it is recommended that you complete all other modules prior to this learning on the Personal Independent Payment (PIP) learning journey.

Timings

This handbook will take approximately two hours to complete.

Supervisor and mentor's roles

You should have carried out pre-learning discussions, and have identified a suitable experienced mentor to work with you. Your mentor will use their own specific guide to help you to achieve and develop your new skills.

When the learning process is complete, post-learning discussions will be carried out. This will enable you to determine whether your learning needs have been met or if further training is necessary.

Module Aims and Objectives

Aims

This module aims to provide you with the knowledge of how to clear Management Checks (MC), and how to set up MCs on a Case Worker (CW)/Case Manager (CM) on the Personal Independence Payment Computer System (PIPCS). The module also provides details of when a Quality Assurance Framework (QAF) check is required, and how to refer them to the Quality Assurance Manager (QAM).

Objectives

By the end of this module, with the aid of any reference material, you will be able to:

- identify scenarios where an MC can be generated;
- state what PIPCS action is required to approve or reject an MC;
- identify when a QAF check is required;
- state the process for referring these checks to the QAM, and
- state how to set up a management check profile on an individual PIPCS user.

Topic 01 – Introduction to Management Checks

Management Checks (MCs) are designed to ensure that staff are accurately and correctly processing or maintaining claims.

A check can be generated against a case in PIPCS by a number of different ways including:

- pre-determined MCs set at departmental level e.g. High Value Payment Management Check, removal of a date of death (both of these are subject to a 100% MC)
- when evidence, benefit delivery cases, or payment correction cases are submitted for approval, or
- when a supervisor sets a specific MC profile for a particular user.

When certain checks are generated, PIPCS will place a suspension on the case which will prevent users from completing any action on that case until the check has been cleared. PIPCS will also prevent any further payments being issued until the check is cleared.

When other checks are generated in PIPCS, a suspension will not be applied and payments will continue to be issued.

We will cover how to identify each of these checks, and the corresponding action to clear these checks, later in the module.

PIP34 Management Checks



More information about suspending PIP can be found by following the pathway below:

DWP Homepage > Operational Guidance > Personal Independence Payment > 14 Maintenance > 13 Suspensions



It is the responsibility of the nominated approver i.e. Team Leader (TL), Higher Executive Officer (HEO), or QAM to ensure that the check is correct before it's approved.

For the purposes of this module, we will only make reference to Case Managers (CMs), but it should be noted that Case Workers (CWs) can also be selected for an MC.

What Happens When a Management Check is Generated

When an MC is generated, PIPCS creates a corresponding MC task. A specific task is produced depending on why the check was generated. For example, if a user was selected for an MC because they amended a claimant's bank account details, PIPCS would create an MC task and in the subject field it will state '**Action Required – Check Account Details**'.

The MC task is **not automatically sent to the user's nominated approver**. You will be required to access and search Available Task daily for MCs; alternatively the user may just inform the **nominated approver** an MC has been generated, which will prompt them to search for the MC. To access **Available tasks** you must:

- access the homepage and select **Inbox**. PIPCS will then display **My tasks** page;
- Select **Available tasks** from the shortcut panel on the left hand side.

From this screen you are required to use the search functionality. There are three different options '**Assigned to**', '**Priority**' and '**Deadline**'. All MCs will automatically be set to a high priority so, when using the search functionality, it's advisable to just search for tasks with a high priority.

PIPCS will display the search result at the bottom of the screen. The checks will be easily identifiable as **Management Checks** and will be displayed under the Task Type heading. You will then be required to check if the MC task is for a member of your staff.

You can forward the MC if it is not for a member of your staff or for any other reason.

Is The Management Check For Your Member of Staff

To establish if the MC task relates to a member of staff on your team you will be required to:

- select the MC task and click on the primary link from the 'open' task;
- Identify the user who actioned the case and received the check from the Determinations page. You would check **Created By** to do this;
- if the check is against a member of staff on your team you will need to reserve the task before you can work on the MC.



Reserving a task is covered later in this module.

Is a Quality Check Appropriate?

If you establish that the MC task is for a member of your staff, prior to reserving the task you will need to establish if a QAF check is required. To do this you will be required to contact the QAM either via a task, telephone or face to face (as appropriate).

Initially, a QAF check will be required on the first five randomly generated MCs for each CM. A QAF check is only required if the MC was generated when the CM is finalising a case, or submitting evidence. Initially QAF checks are only being undertaken on CM activities. If you are unsure if the MC generated meets the select criteria, contact the QAM to discuss the check.

If the CM has followed the QAF fully for each of the checks generated, no further QAF checks will be required. If the CM fails the check, they will continue to be referred for a QAF check until they attain the required standard. **If an MC is generated against an appeal, this must be referred for a QAF check.**

A QAF check is carried out to ensure that the user is meeting quality standards; the check is not designed to see if the correct procedures have been followed.



For more information on QAFs, please refer to the following guidance:

DWP Homepage > Operational Guidance > Personal Independence Payment > 19 Management and Quality Assurance Framework (QAF) Checks > 01 Management and Quality Assurance Framework (QAF) checks > Quality Assurance Framework.



Additional information concerning the QAF checks can be found in Appendix 1 at the end of this module.

Quality Check is Needed

After confirming with the QAM that a QAF check is required, you will need to create a manual task for the QAM. This must include details of who the check was generated against; the claimant's details; why the check was generated, and when it was created.

The MC should not be reserved at this point. The QAM will be able to look at the MC task and, if they have TL access, be able to reserve it into their "open tasks". If they don't have TL access, they will not be able to reserve it.

When the QAM has completed their check they will forward the original manual task back to you. Within the notes box the QAM will record the outcome of the check. If the CM has passed the check you can then continue with the MC process and reserve the MC task.



If the QAF check is passed, you are still required to complete a full check on the MC. The QAF check only checks the quality standards have been met. It is your responsibility to check the correct procedures have been followed.

If the check has failed, the QAM will record the full reasons why in the notes box. The QAM will also complete a feedback sheet which they will feed back to the appropriate person.

Once the QAF check has been completed, the original manual task can be closed and you can continue with the MC process.

If a QAF check was not required, you can continue with the MC process and reserve the MC task.

Reserving a Management Check Task

To reserve the MC task:

- Access your homepage and select **Inbox**. PIPCS will then display the **My tasks** page;
- Select **Available tasks** from the shortcut panel on the left hand side of the screen;
- Search for the MC task. Enter the search criteria and then select **Search**. PIPCS will then display the tasks underneath the search functionality;
- Access the **Action tab** on the line for the appropriate task will now be available.
- Select **Add to My Tasks** from the drop-down menu.

You will then be able to access the MC task from **My Tasks**.



It is important that you only reserve MC tasks for staff you have responsibility for.

Management Check Task Reserved in Error

If the MC task has been reserved by an incorrect approver, the task cannot then be actioned by the correct approver. Nor can the task be forwarded to the correct approver for them to complete the action either. If you reserve an MC task in error you are required to:

- Notify the correct approver via a manual task that an MC task for a member of their staff has been incorrectly reserved.
- Record full details of the MC task that was taken within the notes box of the task, including details of who the MC was generated against. Suggested wording for the task subject is '**Management check reserved in error**'. The priority for this task must always be set to **High**;

The correct approver then must:

- Complete all necessary action to clear the check. Once this is completed they are required to forward the original manual task back to the incorrect approver who reserved the task originally, telling them the check has been completed and what the outcome was - approved or rejected;

The incorrect approver who reserved the task must then:

- Approve/reject the check, based on the information provided, and then close the manual task.

By completing this action an audit trail for clearing the task is created.



Do you have any questions on anything that has been covered in this topic?

Please ask your mentor.

Topic 02 – Submitted Case Management Check

When a PIP user processes a claim awarding benefit, they will be required to submit the case for approval. PIPCS will select a percentage of these cases for an MC.

All of these MCs are prepayment checks. When a case is selected for a check, PIPCS will not issue any payments until the check is cleared.

PIPCS will automatically create an MC task; which will show as **Management Check**.

If the case is selected for a check, the status of the case will be **Submitted**. When the case is in this status, the user will not be able to make any further amendments until the check has been cleared.



More information about approving a management check can be found by following the pathway below:

DWP Homepage > Operational Guidance > Personal Independence Payment > 19 Management and Quality Assurance Framework (QAF) Checks > 01 Management and Quality Assurance Framework (QAF) Checks > Submitted case selected for management check.

If a PIPCS user attempts to approve or reject a management check or reserve or close a management check task generated by themselves, an error message: 'Error – you are attempting to action a check that you generated' will be displayed.

This could happen where a Case Worker generates an MC then has their access changed to Team Leader the following day – if they selected the check then the error message would appear. In this scenario the Case Worker could forward the MC to another Team Leader from the **My Organisation** tab in the Supervisor workspace.

Checks to Complete Prior to Clearing the Management Check

As covered in Topic 01, the first action to take is to reserve the MC task from **Available tasks** into **My tasks**.

Open the task and select the Primary action link. PIPCS will display the claimant's Benefit Delivery Case homepage. Select the link on the claimant's name which is in the top left hand corner. This will redirect you to the Person homepage.

PIP34 Management Checks

When the Person homepage has been accessed, cross reference the claimant's details with the information stored in the Customer Information System (CIS). The information you should check is:

- Name;
- Address;
- Date of birth (DOB);
- Date of death (DOD) (if appropriate);
- Phone number;
- Details of any known Personal Acting Body (PAB) or Corporate Personal Acting Body (CPAB);
- Any other benefits, and
- If any changes have occurred, take note of when the new start or end date took effect, as this could have an impact on issuing a notification to the correct address.

You should also cross reference any documents held in the Document Repository System (DRS), for example:

- change of address;
- change of name;
- new/change of PAB/CPAB;
- bank details;
- DOD, and
- the time that the information was received (new information could have been received after the check was generated).

Finally the communication record should be checked to see if the claimant or their representatives have contacted the department. Additional evidence could have been provided over the phone, which would form part of the supporting evidence for the MC.

The lists provided above for CIS or DRS are not exhaustive.

The list below gives details of some of the information which can be found on each tab on the Person homepage. This will enable you to cross reference with the information listed above:

- **Background** – foreign residence, history
- **Identity** – previous name
- **Contact** – communication record with the department, including telephone calls, forms, letters etc
- **Financial** – bank account details, payments and deductions
- **Verification** – evidence awaiting verification
- **Cases** – shows cases linked to the record
- **Applications** – status of the claim
- **Issues and Proceedings** – special cautions on the case
- **Tasks** – any outstanding tasks or actions on the case
- **Administration** – displays which benefit centre currently owns the case

Further information can be found by navigating back to the Benefit Delivery Case homepage and selecting one of the following tabs:

- **Claimant** – overview of the claimant details
- **Benefits** – shows at which stage the PIP application is at
- **Timers** – any outstanding information we have requested where a timer has been set and not yet cleared
- **Evidence** – details of all the active evidence for the case
- **Disputes** – details of any reconsiderations or appeals interests
- **Attachments** – view all scanned documents attached to the case
- **Assessments** – when an assessment has been completed you can view the descriptors for an award here

If there is a discrepancy when the claimant's details on PIPCS are cross referenced with those on CIS/DRS, the check should be rejected.

The information may differ because a change, or further information, was received after the check was generated. If this is the case, the check should be rejected and a note included stating '**Rejection due to new information received and not user error**'.

If medical evidence is received after the check has been generated, but before the check is cleared, the check should be rejected. A note should be added stating '**Check rejected as new medical evidence has been received**'.

The CM will need to consider the new medical evidence in line with the PIP User Guide and the QAF.



Further information about rejecting MCs can be found by following the pathway below:

DWP Homepage > Operational Guidance > Personal Independence Payment > 19 Management and Quality Assurance Framework (QAF) Checks > 01 Management and Quality Assurance Framework (QAF) Checks – Case approval check - rejected

When all the information has been cross referenced you need to check all the evidence used in processing the case. To do this you should:

- Navigate to the Evidence Summary Case by selecting the **Cases tab** from the Person Homepage.
- Select the **numeric link** in the Reference;
- Select the **Evidence tab** and the evidence screen will display.

You can select '**active evidence**' or '**in edit evidence**' from the left hand menu. Check this evidence against that held in DRS/communication records/notes page etc. (This list is not exhaustive).

Approving The Management Check

When all the checks/cross referencing have been completed and confirmed, the MC can be approved. To do this, navigate to the Benefit Delivery Case. By selecting the **Home tab**, you will be redirected to the Evidence Summary Homepage. Scroll down to the **Cases** section and then select the **numerical link** in the **Reference** column for PIP Benefit.

In the **Action tab** dropdown, select **Approve Case**.

PIPCS will display the message '**Are you sure you want to approve the case**', if you select **Yes**, the message box will close and the task will also close.

Finally, create a manual task to the PIP user the check was generated against. The task should inform the user that the case has been approved and remind them to complete any outstanding action, for example, informing Her Majesty's Revenue and Customs (HMRC) if appropriate.

The status of the case will also change from **Submitted** to **Approved**.



More information about approving a management check can be found by following the pathway below:

DWP Homepage > Operational Guidance > Personal Independence Payment > 19 Management and Quality Assessment Framework (QAF) Checks > 01 Management and Quality Assessment Framework (QAF) Checks - Case approval check - approved

Rejecting The Management Check

The above instructions can be used to access the **Action tab** within the Benefit Delivery Case. From the drop down menu select **Reject Case Approval**.

PIPCS will then display a pop up box asking '**Are you sure you want to reject the request for approval of this case**'? Select **Yes**.

The original task will close automatically and the status of the case will change from **Submitted** to **Open**.

PIPCS will create a task which will be sent to the original user. The task will inform the user that the check has been rejected.

The user will then be required to take the corrective action on the case and close the task. When they re-submit the case, the status will change from **Open** to **Submitted**. The case will automatically be selected for an MC. PIPCS will create a corresponding task which will be in your Available Task inbox.

This process will repeat until the case is correct.



Do you have any questions on anything that has been covered in this topic?

Please ask your mentor.

Topic 03 – Evidence Approval Management Check



Evidence Management Checks are triggered when applying evidence in PIPCS. However, reports show these checks ‘clog up’ work queues. Because of this, these checks are no longer required.

However, evidence approvals can still be set for an individual user if required, i.e. new or inefficient user, and the check would only apply to that specific user. This topic is therefore relevant for that scenario.

When a PIPCS user makes amendments to the evidence on a claimant’s case, they are required to ‘activate’ the new evidence. In these scenarios PIPCS will select a percentage for an MC.

PIPCS will create a detailed task advising why the check was generated. Within the task, there will be two links, one primary and one supporting information link. If you select the supporting information link, you will be able to view the evidence to be approved or rejected. The evidence will need to be checked against the appropriate source, for example, DRS or a task generated from Disability Living Allowance (DLA) Helpline/PIP Enquiry Line (this list is not exhaustive).

The evidence which the user has submitted will remain in a status of ‘**In Edit**’. PIPCS will prevent the user from activating the evidence until the check has been cleared.

Approving the Management Check

When you have completed all of the checks and the details are confirmed, you can approve the check by navigating to the **My tasks** tab and selecting the MC task. You should select **Approve evidence** and PIPCS will display a confirmation message.

If **Yes** is selected, the original MC tasks will automatically close. Another task will be created and assigned to the user the check was generated against. The Task Type is Management Check and the Subject will be <NINO> Evidence is approved and it needs to be applied. The user will then select the primary link in the task which will take them to the Evidence Dashboard. From here they will be required to Apply Changes to activate the evidence.

Simulation – Approving a Management Check

This simulation starts from a task and will cover the process of approving a Management Check in relation to a claimant period of hospitalisation.



Access simulation – Approving a Management Check – and work through at your own pace.

Rejecting the Management Check

If you decide that the evidence has been entered incorrectly, and the check needs to be rejected, the case should be actioned as follows:

- select the **My tasks** tab and then the **MC task**
- select **Reject evidence** request link
- PIPCS will then display a pop-up box for the rejection reason to be selected from the drop down menu. The options include:
 - date input in error
 - incomplete evidence
 - submitted in error
 - further verification required
 - disagree with evidence
 - evidence conflict, and
 - disagree with conclusion.

If an MC is rejected the **Notes** field becomes mandatory, as you are required to populate it with the full reasons why the check was rejected. If the **Notes** field isn't populated and you select **Reject Evidence**, an error message will be displayed and you will be prevented from continuing with your action.

PIPCS will then allow you to select **Reject Evidence**.

PIP34 Management Checks

PIPCS will automatically close the original MC task and create a new task, which will be sent to the user who generated the check. The task provides full reasons why the check was rejected. The status of the evidence will remain as **In Edit**.

When the user takes the corrective action and re-submits the evidence, it will be selected for another MC. PIPCS will automatically create an MC task which will appear in the Available Tasks inbox of the approver. The process will then be repeated until the check can be approved. Once approved, PIPCS sends a task to the user to manually activate the evidence. Upon user action the task evidence status will change to **Activated**.

Simulation – Rejecting a Management Check

In this simulation you will navigate through PIPCS to follow the process to reject an Evidence Management Check.



Access simulation – Rejecting a Management Check – and work through it at your own pace.

Topic 04 – Payment Correction Case Management Check

As previously covered in the Payment Correction Case module, when the claimant has been over or underpaid, in certain circumstances a payment correction case will be created. When a user takes the necessary action to close the case, PIPCS will select a percentage for a check.

These checks differ from the other MCs as you are not required to approve or reject them. These checks are a prompt for you to check the correct action was taken and then close the original task which notified you of the check. If the check is generated it will not inhibit any payments or place a suspension on the case.

Overpaid Case

When a user closes a Payment Correction – Overpaid Case, PIPCS will select a percentage of cases for a check. An automatic task will be created and sent to the appropriate nominated approver. It will display **Action Required – Check O/P referred** within the task subject. The status of the case will be unaffected.

The nominated approver will be responsible for ensuring the correct action has been taken, for example, referring the overpayment. If all the correct action has been taken, the nominated approver can close the original task and no further action is required.

If the user hasn't completed all of the appropriate action, the nominated approver is required to close the original task and then create a manual task informing the user what action is required.

The user will take the correct action as advised, and then forward the manual task back to the nominated approver. If the correct action still hasn't been taken, close the original manual task and continue to issue a new manual task to the user until the case has been corrected.

Underpaid Case

When a check is generated in an underpayment case, the nominated approver will be sent an automatic task and, within the **Subject** field, it will state **Action Required – Check Payment Correct**. The status of the case will be unaffected by the check being generated.

The nominated approver will be required to check that the case was closed correctly. If the correct action was taken, the task can be closed and no further action is required. If not, the original task will still need to be closed but the nominated approver will need to create a manual task, informing the user of the correct action to take.

The user will take the correct action as advised, and forward the manual task back to the nominated approver. If the correct action still has not been taken, the original manual task should be closed and the approver should issue a new manual task to the user until the case has been corrected.

PIP34 Management Checks



Please refer to PIP30 - Payment Correction Case module to refresh your knowledge of closing a Payment Correction Case correctly.



Similar checks to the Payment Correction Case checks can be generated if a PIPCS user ends a National Insurance Number (NINO), amends a verified Date of Birth. These scenarios should be rare but if they do occur, or if you wish to read more about these scenarios, please refer to:

DWP Homepage > Operational Guidance > Personal Independence Payment > 19 Management and Quality Assurance Framework (QAF) Checks > 01 Management and Quality Assurance Framework (QAF) Checks > Management Checks.



Do you have any questions on anything that has been covered in this module?

Please ask your mentor.

Topic 05 – Amending Bank Account Details

When bank account details are amended, PIPCS will select a percentage for an MC and create a corresponding MC task. On receipt of the task you will have to check what documents/information have been received to support the change.

If you decide the correct action has been taken, you can approve the check by:

- Selecting the link within the task displaying the appropriate case for approval;
- Select the **Action tab** and, from the drop down menu, **Approve**;
- Confirm you wish to approve the MC by selecting **Yes** on the confirmation screen.

The confirmation screen will close and the original task will be closed.

If you decide that the correct action hasn't been taken, reject the check by:

- Selecting the link within the task which will display the appropriate case for rejection;
- Selecting the **Action tab** and, from the drop down menu, select **Reject**; and
- Select **Yes** and, in the confirmation screen, add supporting comments as to why the check has been rejected.

PIP34 Management Checks



If you fail to enter comments, PIPCS will display an error message and you will be unable to clear the check until comments are entered.

PIPCS will close the original task, and create a new task which is sent to the user the check was generated against. The task will include your notes as to why the check was rejected.

The user will correct the case as directed, close the task and re-submit for approval. PIPCS will automatically re-select the case for a check and create an MC task, which will be sent directly to the appropriate approver.



If a change of account details are taken over the phone by a telephony agent, the supporting evidence is different. There is a facility to listen to calls. This is covered more in detail in the telephony modules and PIP08 Using PIPCS for Updates.



Do you have any questions on anything that has been covered in this topic?

Please ask your mentor.

Topic 06 – High Value Payment Management Check

Batch payments exceeding a set amount are subject to a 100% MC; a 'Check Payment Correct' task is sent to the supervisor - this is known as a High Value Payment Management Check. In these scenarios you will not need to reserve the task, as it will go directly to the nominated approver. PIPCS will automatically suspend payment and suppress the decision notification on these cases.

The supervisor can approve or reject the check via the Financials screen. If the check is approved, PIPCS will issue the payment and the decision notification.



Further information about High Value Payment Management Checks can be found by following the pathway below:

DWP Homepage > Operational Guidance > Personal Independence Payment > 19 Management and Quality Assurance Framework (QAF) Checks > 01 Management and Quality Assurance Framework (QAF) Checks – High Value Payment Management Check

Approving The Check

If the payment is correct:

- Access the Person Homepage;
- Select the **Financials tab** and navigate to the transactions list page;
- Select the **Action tab** for the appropriate payment;
- Select **Approve** from the drop down menu;
- Select **Yes** and then
- Select **Close**.

The confirmation screen will close; PIPCS will remove the suspension and issue the payment.

Rejecting The Check

If the payment is incorrect:

- Create a manual task detailing why the payment is incorrect and send to the original user;
- Close the original task.

On receipt of the task the user should correct the data they input on PIPCS, and forward the manual task back to you.

If correct, approve the payment as detailed above.

If still incorrect, detail why in the original manual task and forward it back to the original user.

PIP34 Management Checks



Do you have any questions on anything that has been covered in this topic?

Please ask your mentor.

Topic 07 – Setting a Management Check Profile

It is possible to set up MCs on individual users. There are variations of how these checks are generated, for example:

- Certain case types the user works on can be selected. The percentage of how many of these cases are selected can be adjusted;
- Checks can be set up to be triggered when a certain monetary value is exceeded.

This functionality can be used on accuracy teams and for training and monitoring exercises.

Creating a Case Approval Check

To set up a case approval check for an individual:

- Access the **Shortcut tab** from the left of the screen and select **My Users**. This screen will list all of the users you have managerial responsibilities for.
- Select the appropriate user;
- Select Case **Approvals tab**. PIPCS will then display a view screen, from here select **New**;
- Enter the percentage of checks required. This is a mandatory field.

PIP34 Management Checks



For new entrants who have just completed training, the percentage can be set to one hundred percent if the TL feels this is necessary. For more experienced staff the percentage can be set much lower.

The estimated cost details can be entered but this field is not mandatory;

Estimated cost details refers to how much a payment can be issued before a check is generated. For example, if the value was set at £100.00, all payments of £100.00 or more will be subject to an MC.

- Select the different types of case that the checks should be set up against. This field is mandatory;
- Notes field may be populated but this is optional;
- Select **Save**.

You will then be returned to the **Case Approval check list screen** and the new check will be displayed here.



If you enter invalid data, or do not populate the mandatory fields, PIPCS will display an exception message. This will prompt you to enter valid details or populate the mandatory fields.

Simulation – Setting a Management Check Profile



In this scenario, you are going to set a Management Check profile for one of your members of staff.



Access simulation – Setting a Management Check Profile and work through at your own pace.



More information about setting a management check profile can be found by following the pathway below:

DWP Homepage > Operational Guidance > Personal Independence Payment > 19 Management and Quality Assurance Framework (QAF) Checks > 01 Management and Quality Assurance Framework (QAF) Checks > Setting a Management Check Profile.

Modifying a Case Approval Check

You can modify any existing case approval check for a specific user.
To do this:

- Access the case approvals list screen; this is the same screen you accessed originally to set up the checks;
- Identify which check you wish to modify then select the **Action tab** for that check. From the drop down menu select **Edit**;
- PIPCS will then display the Case Approval Check In Edit screen with the existing details populated;
- Choose which details you wish to edit. If required you can add comments and then select **Save**;
- PIPCS will close the In Edit box and return you to the view screen. The modified case approval check will be displayed here.



If you enter invalid data, or delete data from a mandatory field and leave it blank, PIPCS will display an exception message. This will prompt you to enter valid details or populate the mandatory fields.

Simulation – Editing a Case Approval Check



In this scenario you are going to edit an existing case approval check for a member of your staff.



Access simulation – Editing a Case Approval Check and work through it at your own pace.

Deleting a Case Approval Check

When the case approval check is no longer required you need to delete the check. To do this:

- Access the case approvals list screen; this is the same screen you accessed to set up the checks originally;
- Identify which check you wish to delete then select the **Action tab** for that check. From the drop down menu select **Delete**;
- PIPCS will display a confirmation screen, select **Yes**;
- PIPCS will return you to the view screen; the case approval check status will have changed to **Cancelled**. This screen will keep a history of the checks which have been set up or cancelled for the user.

Simulation – Deleting an Existing Case Approval Check



In this scenario you are going to delete an existing case approval check for a member of your staff.



Access simulation – Deleting an existing case approval check – and work through it at your own pace.

PIP34 Management Checks



More information about deleting a Management Check profile can be found by following the pathway below:

DWP Homepage > Operational Guidance > Personal independence Payment > 19 Management and Quality Assurance Framework (QAF) Checks > 01 Management and Quality Assurance Framework (QAF) Checks > Setting a Management Check Profile



Do you have any questions on anything covered in this module?

Please ask your mentor.

Module Summary

Now you have completed this module, you should be able to:

- approve a management check;
- reject a management check;
- identify when a QAF check is required and how to refer it to the QAM;
- set up a management check profile on a PIP user;
- modify a management check profile for a PIP user, and
- delete a management check profile for a PIP user.

Appendix 01 Additional Information on QAF Checks

QAF checks will be identified following an MC being generated either by:

Case based – This is a full case check which is activated when an award decision is input or payment correction case to manage overpayments/underpayments; or

Evidence based – These checks are activated when the user selects the 'Apply' button following certain changes in circumstances or receipt of specific information.

A CM will receive five checks for the following:

- Making a Decision
- Making an Outbound Explanation Call
- Making a Decision – Reconsideration
- Making a Decision – Intervention

Once the quality standards have been met, the CM will be subject to 2% checks on all the activities listed above. The first 400 National Appeal Responses produced will all be subject to a QAF check.

All QAF checks have a corresponding Checkers template. The QAM will use these templates as an aid to help them complete the checks.

The outcome for all QAF checks will be recorded on a database.