Contact made with a Customer/representative which indicates they are having financial difficulties and/or need support in making a claim for benefits

Advice can be found on Gov.uk

Perform a benefit check to establish whether the Customer should be claiming a benefit that they are not receiving or the benefit they are receiving appears to need reviewing

Removes any delays in receiving Benefit

Where the Customer has a friend or relative that can support provide the relevant information to them and signpost them to GOV.UK

Signpost the Customer/ official representative to the advice line detailed in Gov.uk and how to claim

Support the Customer/ official representative in making a claim either online, by telephone or clerically

**Consider a referral to DWP Visiting where** you are unable to provide the Benefit support needed and

1. the Customer is vulnerable and because of their complex needs unable to use the standard channels e.g.
   1. Online b. By telephone c. Clerical claim

and

1. the Customer has no official representative

and

1. the Customer has no friend or relative that can support them in using these channels

**You can also consider a referral to DWP Visiting where**

1. The Customer is no longer mentally capable of dealing with their own affairs and needs someone to act for them

and

1. they receive Benefits from the Department or need to make a claim

and

1. no one has already been legally appointed to act on their behalf

**Frequently Asked Questions**

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| What defines vulnerability? | For DWP purposes the description of Vulnerability is “An individual who is identified as having complex needs and/or requires additional support to enable them to access DWP benefits and use our services” |
| Why do you need the referrer to do a Benefit Check as the Visiting Officer will do this at the appointment? | The Visiting officer will prepare for the visits with specific forms and allocate a certain amount of time. Without this preparation the Visiting Officer may need to curtail the appointment and return at a later stage or indeed find that the visit was not necessary in the first place. This wastes both the Visiting Officer’s time and the Customer’s, delays payment and could cause distress to a vulnerable person. |
| I am concerned about performing a Benefit check as I am not benefit trained what do I do? | DWP Visiting understand that different partners will provide different levels of support however in general a referrer would normally be in a position to understand what benefit needs to be investigated. Visiting Officers as a standard will look at all benefits during the interview so will capture any that are missed. The better prepared they are the more likely they will achieve a successful outcome first time. |
| By the nature of vulnerable customers they are often unable to provide enough information to perform a benefit check and we have no access to this information, can I still send a referral for a benefit check? | Exceptionally this can be done if you have a clear indication that the Customer is missing out on benefits and is in financial difficulties however in general we would expect the referrer to have a good idea of what benefit we need to look at. |
| The Customer is not vulnerable but wishes to apply for a benefit that can only be claimed on line however they do not have the equipment or ability to do this can I refer them? | We would initially look to relatives/friends to support them in this as this is by far the quickest way to get the benefit in payment. Failing this they would need to discuss these issues with the advice line as there is normally an exceptions process. We would not expect a referral if the Customer was not vulnerable. |
| The Customer has an appointee but they are also vulnerable can I still refer? | There will always be exceptional circumstances like this however the referrer would need to make this clear in the referral and it is possible the Visiting Officer would review the appointee’s fitness to act for the Customer. |