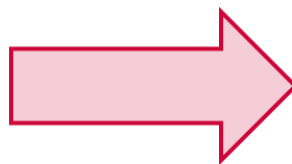


# **Social Security Experience Panels: Others speaking to Social Security Scotland for clients**

## **Background**

The Scottish Government is becoming responsible for some of the benefits currently delivered by the Department for Work and Pensions (DWP). As part of work to prepare for this change, the Scottish Government set up the Social Security Experience Panels.

**Department  
for Work and  
Pensions**



**Scottish  
Government**



Over 2,400 people registered as panel members when Experience Panels launched in 2017. They all have recent experience of the benefits that are coming to Scotland.

The Scottish Government is working with Experience Panel members to create Scotland's new social security system.



**2,400+  
Experience Panel  
members**

## About the research

This report gives the findings of the 'Personal Independence Payment Assessments' research.



**2243**

Invites



**247**

Survey responses

The research took place in



**2020**

The research asked Experience Panel members views on:



Whether they would feel comfortable with someone else being able to contact Social Security Scotland on their behalf.



What they would want someone else to contact Social Security Scotland about.



How to give their permission for someone to contact Social Security Scotland on their behalf.

Participants were aged between

**25 – 80**

years old



**34%**

Man or boy



**66%**

Woman or girl



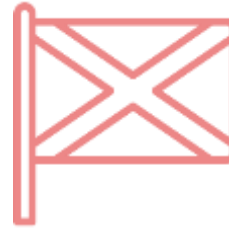
**82%**

lived in an urban location



**19%**

lived in a rural location



Participants took part from

**28**

of

**32**

local authority areas

**Most survey participants had a disability or long term health condition (87%), including:**



chronic pain



severe hearing impairments



severe visual impairments



other kinds of long term health condition

**Four in ten (44%) of survey participants were:**



a carer due to **old age**,



a carer to a **child**, or



a carer to an **adult**.

## Previous experiences

Respondents had mixed experience of someone else contacting an organisation on their behalf.



Over half (54 per cent) had no experience of this, compared to over four in ten (45 per cent) who did.

We asked respondents who had the experience of someone contacting an organisation on their behalf, what it was like.



Many respondents said someone else contacted the DWP on their behalf during a benefit application process or when appealing a decision. Others said they needed someone to speak on their behalf to resolve a specific issue.



Respondents said people from different organisations had made contact on their behalf. Examples included help and welfare rights organisations, charities, advocacy workers and social workers.



Some respondents said that a family member had contacted an organisation for them.

**WHY?**

Some respondents explained why they needed someone else to contact an organisation for them. A few said that their disability or health condition meant that it was necessary either on some occasions or all of the time.

“The member of staff phoned on my behalf because I am hearing impaired.”

“I was ill and had a timed response to a letter. My daughter had to phone them to explain the situation.”



“CAB called the DWP on my behalf as I had been suffering from mental health issues and was not able to fully understand what they were asking me for. The CAB advisor was taking the question and explaining it to me and then giving the DWP advisor my answer in an appropriate way but with my agreement.”

## What went well

We asked respondents with experience of people contacting organisations on their behalf what went well about it.



The most common response was that they thought the person speaking knew more about the benefits system.



Others felt they were better at explaining key points and dealing with any challenges.

“They were able to communicate with them as they knew all about benefits, which I didn't.”

“That person could communicate my problems better.”



Some respondents said it helped with feelings of stress and anxiety of contacting an organisation.



For respondents who spoke about applying for a benefit or appealing a decision, having someone speak for them gave them reassurance that their query was being dealt with properly.

“I felt the person contacting the DWP were listened to more than myself so it went well as everything was factual and she spoke up for me.”

“The advisor from CAB helped me to win each appeal. He knew what to do and when whereas I was simply overwhelmed with the process and the paperwork. He enabled me to speak when I had to and spoke for me when I couldn't.”



Some respondents said that their experience went well because it was easy to set up and that the organisation were understanding of their need for this.

“The DWP staff were generally polite and accepting of my need to have someone else handle the call. The project workers accurately relayed what was said or used speakerphone.”

“Once I've named someone and given written consent in a letter it normally works well and my Mum usually speaks for me and I give her any written notes of what I want saying.”

## What could have gone better

We also asked respondents with experience, what could have gone better with their experience of someone contacting an organisation on their behalf.



Some respondents said the organisation being contacted would not speak to the person they had asked to speak for them.

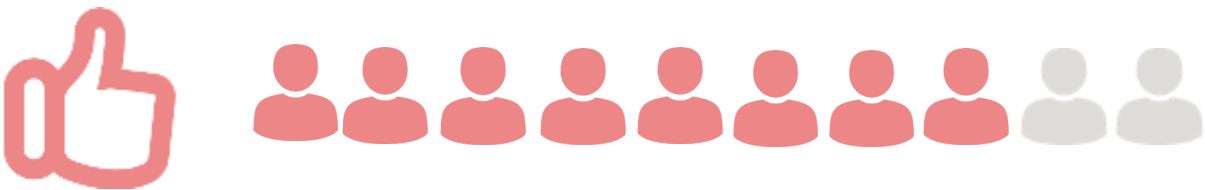


Most of these respondents felt the process of nominating and verifying the person they wished to speak for them could have been made easier and quicker.

“It was quite difficult as they insisted in talking to me and not the person who was speaking on my behalf.”

## Someone contacting Social Security Scotland for clients

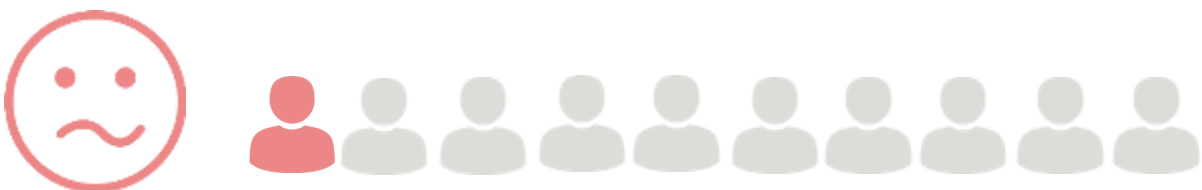
Eight in ten of all respondents (80 per cent) said they thought they would always, sometimes or rarely, want someone else to be able to speak to Social Security Scotland on their behalf.



Over one in ten respondents (12 per cent) said they would never want someone else to be able to speak to Social Security Scotland on their behalf.



Eight per cent said they did not know.







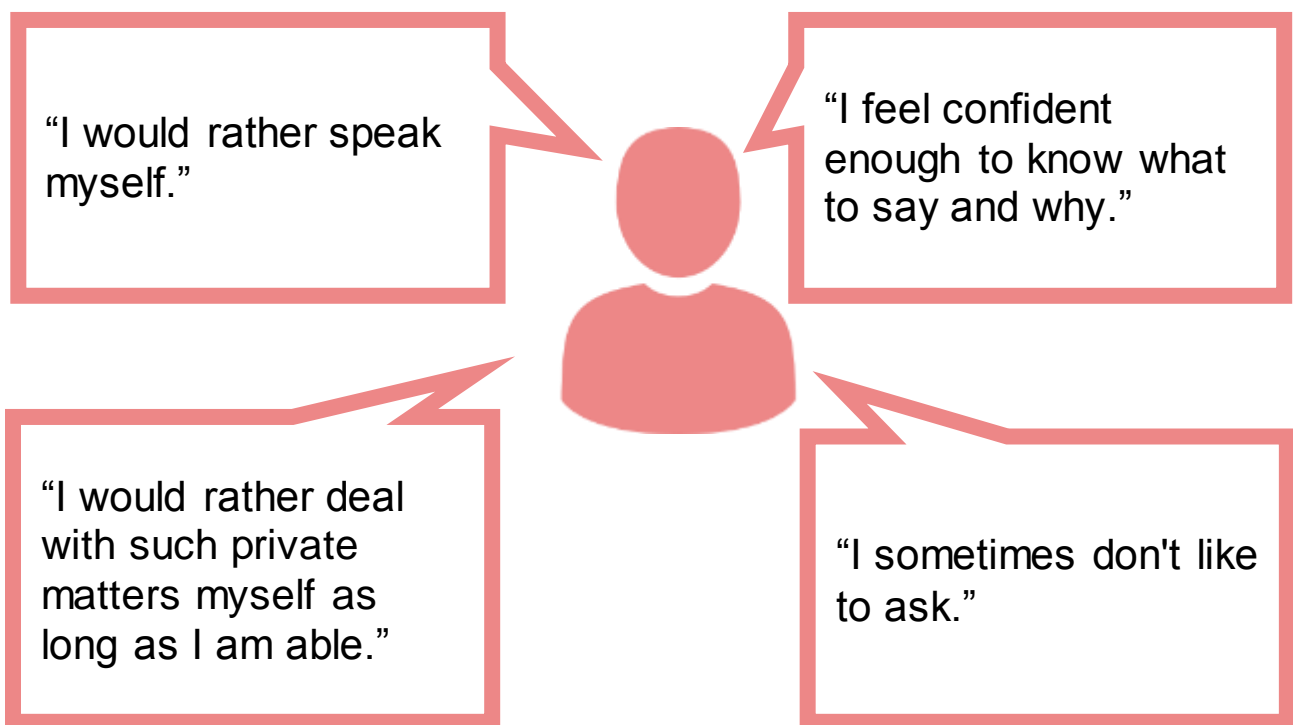
Of respondents who said they would never want someone else to be able to speak to Social Security Scotland on their behalf, two thirds (66 per cent) said they would not need it.



Just under three in ten (28 per cent) said they would not feel comfortable.



No respondents said they would not know who to ask.



## Who could speak on a client's behalf

We asked respondents who said they would want someone else to speak on their behalf who they would want this to be.



Just under eight in ten (79 per cent) said they would want a professional supporter, for example, a support worker, advocate, Citizen's Advice Bureau or local authority worker.

“The system at times can be very complicated to work round so a professional adviser is always a good thing they have all the knowledge.”



Seven in ten (72 per cent) said a friend or family member.

“Family members know you better than anyone else. They know your symptoms and how to help you.”



Two thirds (65 per cent) said they would want a medical professional.

“I think that doctors should be able to speak on behalf of clients as, everything is assessed based on medical need or disability and apart from the applicant themselves, doctors will know the most accurate information.”

## What someone might speak on a client's behalf about

We asked respondents what they would want the person contacting Social Security Scotland for them to talk to staff about.



Just under nine in ten of those same respondents said they would want the person to talk about a redetermination or appeal (88 per cent).



Around eight in ten said they would want the person to seek an explanation of a decision (81 per cent) or get help with an application (79 per cent).



Two thirds said they would want the person to report a change of circumstances (66 per cent)



Just under six in ten have any ongoing contact with Social Security Scotland on their behalf (59 per cent).

## Giving consent for someone else to speak to Social Security Scotland

We told respondents that if they were to be represented by someone else, they would need to inform Social Security Scotland that they were happy to be represented by that person.

We asked respondents how they would want to let Social Security Scotland know that they were happy with someone else speaking on their behalf.



Around four in ten respondents (44 per cent) said they would want to let Social Security Scotland know through an online method (computer, mobile phone or tablet).



18 per cent said telephone.



16 per cent said post using a paper form.



One in ten (10 per cent) said they would like to tell Social Security Scotland in person during a home visit.



Only 3 per cent said they would like to do so in person at a Social Security Scotland location.

## Sharing information

We told respondents there are some kinds of information that Social Security Scotland would never share with anyone other than the client themselves, even if someone had a client's permission to talk to Social Security Scotland on their behalf:



- Addresses
- Dates of birth
- National insurance numbers
- Bank details
- Telephone numbers
- Names of household members
- Names of employers or former employers

We asked respondents if there was any other kind of information they would not want shared between Social Security Scotland and someone making contact on their behalf.



Most said no, or left responses about the information listed above.



Some said they trusted anyone they asked to speak on their behalf with their personal information.

“Anyone that was acting on my behalf would have my full confidence to respect any information as personal and would not use any such information to my detriment.”



A few respondents were confused about how someone could speak to Social Security Scotland on their behalf without discussing or verifying the information above.

“If I've given permission, would they not need some of the items listed above to be sure it was my account they were discussing?”



“I find it difficult to understand how anyone could conduct business on my behalf if the above details could not be discussed.”



On the other hand, some said they would not want any medical information such as disability, health condition or medication shared.



Others said they would not want information about their religion or ethnicity shared, or financial information about the benefits they are receiving.



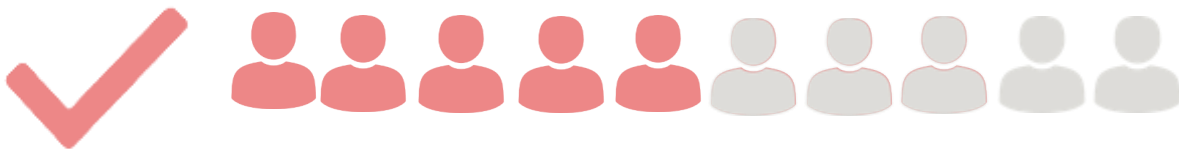
Some respondents said that the kind of information they would not want shared between Social Security Scotland and someone making contact on their behalf depended on who was making the contact for them.

“Depending on who it was, they may well have this information already.”

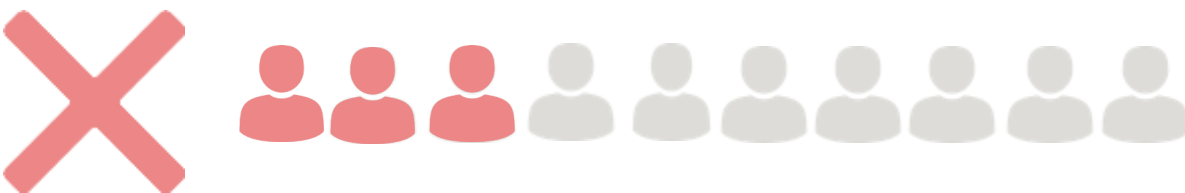
“It depends on who is representing me and how much I trusted them.”

We asked all respondents if the kind of information that they would want shared would be different depending on whether their representative was a professional or a friend or a family member.

Just under half of respondents (49 per cent) said the kind of information that they would want shared would not be different.



Just under three in ten (29 per cent) said it would be.



Around two in ten (22 per cent) said they did not know.

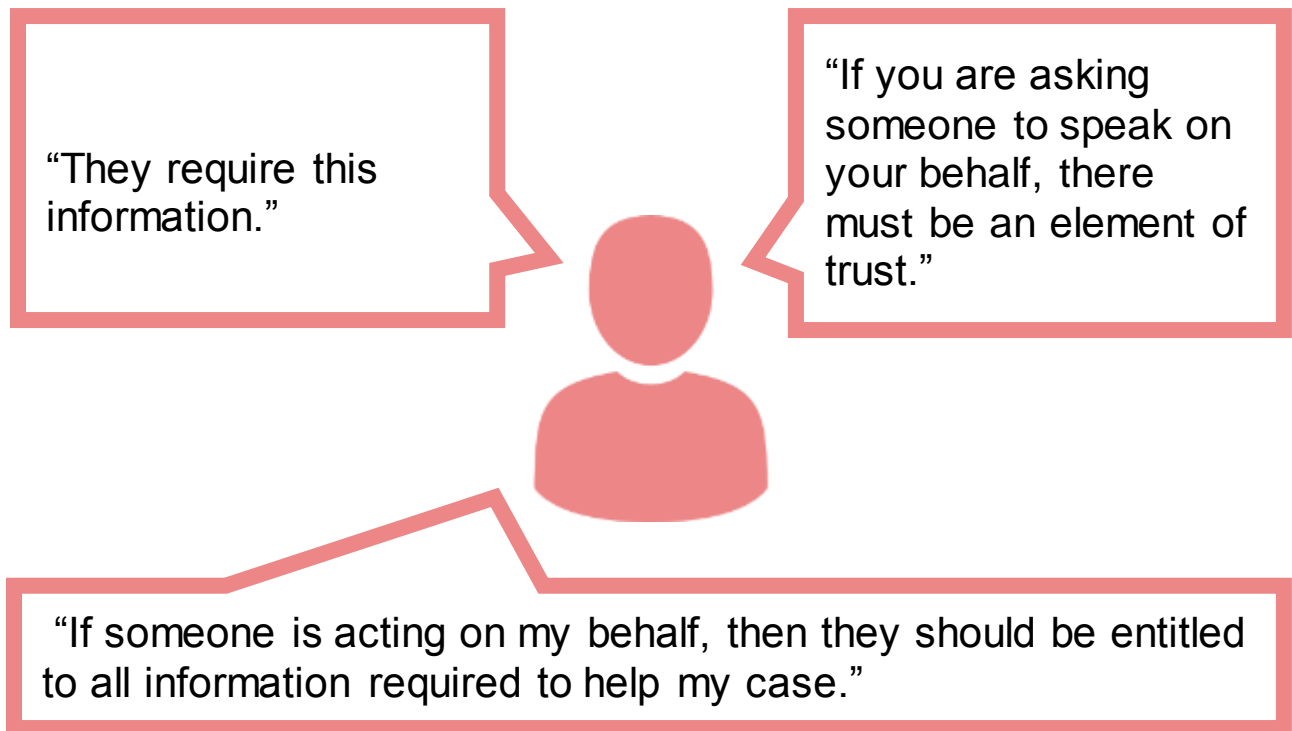


We asked respondents to explain their answer.

Respondents who said that the information would not be different mostly said that:



- They would trust the representative.
- The information would already be known to the person.
- It was necessary and in their best interests that they did.



Respondents who said that the information would be different, or that they did not know, said it depended on the situation:



- Who the representative was.
- Their relationship to the representative.
- The situation and the information being discussed.

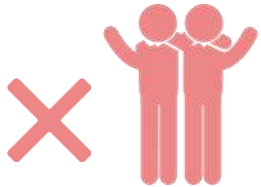


“Being asked if you've ever been suicidal in front of a family member who maybe didn't know. Being asked if you wet the bed in front of a CAB representative. Some questions may have to be asked because of the way the system is structured but the DWP should be more sensitive about who is present when they ask them.”



Some respondents said they would want 'more' information shared with family and friends.

“I would be happy for the family member to have any information but it would depend on the professional as to what health information I would like to share.”



For others, this was the opposite.

“Professionals may need to know something I want to protect my family from.”

“Don't want friends or family to know all personal information.”

## Contacting without direct consent in an emergency



We told respondents that if a client does not give permission for someone else to represent them, Social Security Scotland will not discuss them or their case with anyone else.



However, there could be some emergencies, where a client may wish to be supported by someone, but they are unable to give their consent at that time. For example a client could be in hospital and unable to contact Social Security Scotland themselves. So they may ask someone else to contact Social Security Scotland on their behalf about their benefits.

We asked respondents if they would feel comfortable with Social Security Scotland discussing their benefits with their representative in an emergency.



Over eight in ten respondents (86 per cent) said they would feel comfortable.

We asked what information they would want shared in an emergency.



Over eight in ten respondents (85 per cent) said they would be happy for Social Security Scotland to discuss information about the emergency.



Just under eight in ten (78 per cent) said information to support a claim.



Seven in ten (70 per cent) said information about their application.

We asked respondents if there is anything else they would like to say about other people contacting Social Security Scotland on their behalf. Respondents said:



It is important for strict confidentiality safeguards to be in place



Information on safeguards and how to nominate someone should be clear and accessible

“Make sure they can prove who they are and can act on your behalf officially.”

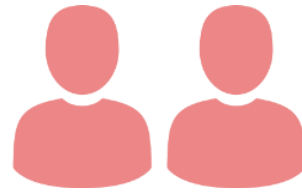
“That only relevant information regarding the situation is given and used.”

“Information about this process and who can do what must be clear, accessible and widely available so everyone has the right information.”

“Would need a lot of clarity regarding confidentiality and who would be allowed to speak to them on my behalf.”



Record and regularly review who could speak to them on behalf a client



Allow clients to have more than one named representative

“I would like to nominate people and to be asked by social security Scotland after a period of time if I’m still comfortable with these people helping me.”

“Would like to have more than one named person who able to contact SSS on my behalf. This is to ensure someone available when needed. Ease of being able to change the named persons, to account for their changing circumstances. Reminders about keeping such information up to date needed too.”



Other respondents said that the idea of others speaking to Social Security Scotland on behalf of a client was a positive one.

“I think it is really needed for some people in times of stress or when people can't speak for themselves either because of an illness or incapacity to do so.”

## Next steps



Insights from this research are informing decisions about how others will be able to speak to Social Security Scotland on behalf of a client.



This includes decisions about how Social Security Scotland collects and stores the details of representatives speaking on behalf of a client (including those from organisations). They are also shaping decisions about what client information is then able to be shared with representatives.



The findings from this work are also being used to provide guidance for Social Security Scotland staff. This guidance will help staff to have conversations with those who call Social Security Scotland on behalf of someone else.



It will also help staff to be prepared for situations that involve another person speaking to Social Security on behalf of a client. For example, guidance now exists for staff for when a client is too ill to speak to Social Security Scotland and wishes somebody else to speak on their behalf.



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