



Social Security Experience Panels - Personal Independence Payment Health Assessments Part two



**EQUALITY AND WELFARE to EQUALITY,
POVERTY AND SOCIAL SECURITY**

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Introduction

In February and March 2020, the Scottish Government carried out a survey with Experience Panel members on the current and future health assessment process for Personal Independence Payment (PIP).

This work was part of the Scottish Government's Social Security Experience Panels programme of research. In total, 384 Experience Panel members with experience of PIP took part in the survey (a response rate of 29 per cent). The findings of this survey reflect the views of the respondents only. This report details the findings and key themes that emerged from this work.

Summary

Around three quarters of respondents (73 per cent) were currently in receipt of PIP and nearly one quarter (23 per cent) had helped someone else to apply. 2 per cent had received PIP in the past and 2 per cent were applying for PIP for the first time.

Nine in ten respondents (90 per cent) had attended a PIP assessment before. Over half of respondents (57 per cent) had attended their own assessment, while just under two in ten (19 per cent) had attended an assessment to support someone else. 14 per cent had attended both their own assessment and to support someone else.

Just under seven in ten respondents (68 per cent) had their most recent assessment at an assessment centre. Three in ten (31 per cent) had their most recent assessment at home.

Around four in ten respondents (46 per cent) felt there were positive and negative aspects to their assessment experience. Around four in ten respondents (44 per cent) felt their assessment experience was negative overall, whilst around one in ten respondents (11 per cent) felt their assessment experience was positive overall.

Respondents were split on whether they would feel comfortable having an assessment over the phone. Around four in ten respondents (41 per cent) said they would feel comfortable and around four in ten (43 per cent) said they would not. 16 per cent said they did not know.

Of those respondents who said would feel comfortable having an assessment over the phone or that they did not know, the majority (89 per cent) said that between 9 am and 5 pm would be the best time for them to have an assessment.

Of those same respondents, almost all (96 per cent) said they would be comfortable having an assessment over the phone in their own home. Around two in ten respondents said they would be comfortable at a building or office run by a charity (21 per cent) or at the GP office (18 per cent). 14 per cent said they would feel comfortable having an assessment over the phone at a Social Security

Scotland venue. The least popular options were at a local authority office and a local library.¹

We asked those same respondents what devices they would use for the assessment. The most popular options were personal mobile phone (69 per cent) or landline (70 per cent). This was followed by personal PC or laptop (19 per cent) or tablet (22 per cent). Under one in ten respondents said they would use someone else's phone, tablet or laptop (7 per cent) or a phone that is available in a public area (8 per cent).*

Seven in ten of all respondents (72 per cent) thought there would be difficulties with having an assessment on the phone.

Of those respondents who said there would be difficulties with having an assessment over the phone, nearly four in ten (39 per cent) said the main difficulty would be expressing themselves properly. Over one in ten (14 per cent) thought the main difficulty would be not being able to see the assessor. Collectively, problems with call quality, signal issues, not being able to hear the assessor and finding it hard to speak loudly accounted for around two in ten responses (19 per cent).

Of the 27 per cent of respondents who selected 'other' to indicate that they thought another issue would be the main difficulty in having an assessment over the phone, most referred to a combination of the responses already listed. Other respondents said their health condition would be the main difficulty or that there would not be enough time to think over the phone, that they may struggle to understand the assessor or respond in the way they wish to. Many said the main difficulty would be the assessor not being able to see them in order to get a full and accurate understanding of their health condition or disability.

Over half (54 per cent) of respondents said if they were applying for the first time, they would want to find out what happens in an assessment when they are told they need one. Just under half (47 per cent) said they would like this information before they apply for PIP. Just under three in ten respondents (28 per cent) said they would want to find out what happens in an assessment immediately after submitting their application. Around one in ten respondents said they would want to find out what happens in an assessment the week (10 per cent) or day (8 per cent) before the assessment itself.*

Nearly half of respondents (47 per cent) said that a face to face assessment in their home would suit them best. This was followed by one quarter of respondents (24 per cent) who said a face to face assessment at a location near them (e.g. GP, Third Sector venue) and nearly two in ten respondents (18 per cent) who said an assessment over the phone would suit them best. Face to face assessment at a Social Security Scotland venue was the least popular option, with just over one in ten respondents (12 per cent).

¹ *Respondents were able to select multiple response options.

Of those respondents who said an assessment in their home would suit them best, seven in ten (70 per cent) said this was because their disability, mental health or long term health condition makes it difficult for them to leave home. Just under seven in ten respondents (69 per cent) said they would feel more comfortable in their own home. One quarter (26 per cent) said an assessment in their home would suit them best because they would not need to spend time travelling.²

Three quarters of respondents (76 per cent) said they would like to state their preferences for an assessment on the initial application form. Only two in respondents overall (24 per cent) said they would like to tell Social Security Scotland their preferences after being invited to an assessment either online, over the phone or by post.

Nearly half of respondents (47 per cent) said Social Security Scotland's website is the first place they would look for guidance about assessments with Social Security Scotland. The second most popular place to look for guidance would be at a support organisation e.g. Citizens Advice Bureau or Welfare Rights, with over one third of respondents (35 per cent) stating this. Combined, all other potential places to look for guidance about assessments such as GP office, online forums, family and friends and on the phone to Social Security Scotland were chosen by just under two in ten respondents (19 per cent).

Nine in ten respondents (89 per cent) said they would want to involve someone such as a family member, carer or advocate to support them during the assessment.

Of those who said they would want to involve someone to support them in the assessment, seven in ten (70 per cent) said they would like to involve a family member. Half of respondents (51 per cent) said an advocate and over one third (35 per cent) said a carer. Of respondents who said they would involve 'another person' to support them at their assessment, most said they would involve a friend.*

Almost all respondents (94 per cent) said they would like the person to support them by being in the room or on the phone with them. Over one third (36 per cent) would ask their supporter to provide a written statement of support.*

Of respondents who indicated they would like the person to support them in another way, most said they would want the person to help them communicate or speak on their behalf. This including clarifying questions and helping them to remember to convey important information to the assessor.

Respondents were asked if there is anything else Social Security could do differently when it takes over responsibility for PIP assessments. The most common response was that Social Security Scotland should use medically trained health and social care professionals to conduct assessments. Many respondents said the

² *Respondents were able to select multiple response options.

assessor should have in-depth knowledge of the particular clients' health conditions to tailor the assessment. Others said that assessors should also be qualified in mental health conditions. Many of these respondents said that assessments should not be carried out by an external, third party organisation.

The second most common response was that assessments should be conducted in a way which treats people fairly and respectfully. Related to this theme, some respondents noted it was important for people to be effectively listened to by empathetic assessors during the assessment, and that assessments should be reported truthfully and accurately. Others said that assessments should be recorded or that clients should be provided with a copy of the assessment report.

Another common response to what Social Security Scotland can do differently in relation to assessments was to reduce the need for them. Other themes included ensuring assessment spaces are accessible, close to home and friendly, as well as offering flexibility in terms of home assessments and changes to appointments depending on the needs of the client on the day of assessment.

Background and research methods

The Scottish Government is becoming responsible for some of the benefits currently delivered by the Department for Work and Pensions. This includes PIP, a benefit designed to help people with the additional costs incurred as a consequence of living with a disability or long term health condition.

As part of the work to prepare for this change, the Scottish Government set up the Social Security Experience Panels. Panel members are people from across Scotland who have recent experience of at least one of the benefits coming to Scotland. Over 2,400 people registered as panel members when Experience Panels launched in 2017. The Scottish Government is working with Experience Panel members to design a new social security system that works for the people of Scotland, based on the principles of dignity, fairness and respect.

The Scottish Government has already made a number of decisions in the process of developing a new approach to assessments when Social Security Scotland takes over responsibility for PIP. Most relevant, the Scottish Government has committed to significantly reduce the number of individuals required to attend a face to face assessment to determine their eligibility for PIP.³ When people apply, they can tell Social Security Scotland about the health and social care professionals who already support them. Social Security Scotland would then contact those professionals or their organisations to collect supporting information for clients. When it is the only practical way of collecting the information or where it is not possible to gather enough evidence to make a decision, a minority of clients would

³ Department for Work and Pensions (2019) *PIP assessment guide part 1: the assessment process*. [Online] Available at <https://www.gov.uk/government/publications/personal-independence-payment-assessment-guide-for-assessment-providers/pip-assessment-guide-part-1-the-assessment-process>

be invited to a discussion with a health and social care practitioner. Other commitments made include:

- Not using private sector contractors to deliver assessments. All face to face assessments will be delivered by Social Security Scotland.
- Providing suitably qualified health and social care practitioners to undertake assessments.
- Offering a choice of an appointment date, time and location that suits clients, home visits will be available when they are required.
- Giving people the right to be accompanied to an assessment, and to have that person participate. Social Security Scotland will also ensure access to advocacy support for disabled people.
- Providing people with a copy of the assessment report without having to request it. Assessments will be audio recorded as standard.

These decisions and the design of the new service have been informed by research with people who have direct lived experience of disability and long-term health conditions and those who support them. This has mostly been through the Experience Panels across numerous projects. This has included asking Experience Panel members about their experiences of PIP assessments⁴ and their views on how assessments and appointments should work in Social Security Scotland.⁵ In this project, we have supplemented this work, using a survey to ask Experience Panel members their experiences and views on assessments, including:

- Views on having an assessment over the phone
- Preferences for having someone at an assessment to support them
- Preference for seeking and receiving information about assessments

Respondents were recruited from the Scottish Government Experience Panels. All Experience Panel members who have told us they have experience of PIP were invited to take part in the survey.

The Social Security Experience Panels are a longitudinal research project. The panels are made up of volunteers from the Scottish population who have relevant

⁴ Scottish Government (2018). *Social Security Experience Panels: Personal Independence Payment discovery - visual summary*. [Online] Available at: <https://www.gov.scot/publications/social-security-experience-panels-personal-independence-payment-discovery-visual-summary/>

⁵ Scottish Government (2018). *Social Security Experience Panels: Personal Independence Payment health assessments*. [Online] Available at: <https://www.gov.scot/publications/social-security-experience-panels-personal-independence-payment-health-assessments-main-report/pages/1/>

experience. The results of this work should be regarded as being reflective of the experience and views of the participants only, and are not indicative of the views of a wider Scottish population. Percentages are given only to show a broad sense of the balance of opinion across participants.

Information from the survey was added to information from the ‘*About Your Benefits and You*⁶ and ‘*Social Security Experience Panels: Who is in the panels and their experiences so far*⁷ surveys. The demographic data collected in these surveys was linked to the information supplied by respondents of this survey as part of the longitudinal data set for the wider Experience Panels project. This data was only available for around two thirds of survey respondents. This is because demographic information for newly registered Experience Panel members was not yet available at the time of writing. The following demographic information is given to provide context to the findings from the survey.

One third of respondents who we have demographic information for identified as ‘man or boy’ (35 per cent) and two thirds (65 per cent) identified as ‘woman or girl’.

Table 1: Gender of survey respondents (n=225)

| Gender | % |
|---------------|-----|
| Woman or girl | 65 |
| Man or boy | 35 |
| Total | 100 |

Over half of survey respondents were aged 45 to 59 (58 per cent) and one quarter were aged 60 to 79 (26 per cent). 16 per cent of respondents were aged between 25 and 44.

Table 2: Age of survey respondents (n=226)

| Age | % |
|------------|----|
| Under 25 | 0 |
| 25 – 44 | 16 |
| 45 – 59 | 58 |
| 60 – 79 | 26 |
| 80 or over | 0 |

⁶ Scottish Government (2017). *Social Security Experience Panels: About Your Benefits and You – Quantitative Research Findings*. [Online] Available at: www.gov.scot/Publications/2017/11/7769/

⁷ Scottish Government (2018). *Social Security Experience Panels: Who is in the panels and their experiences so far*. [Online] Available at: www.gov.scot/Publications/2018/10/3083/

| | |
|-------|-----|
| Total | 100 |
|-------|-----|

Almost nine in ten respondents (87 per cent) had a disability or long term health condition.

Table 3: Disability status of respondents (n=228)

| Disability status | |
|-------------------|----|
| Disabled | 87 |
| Not disabled | 13 |

Just over two thirds of respondents had a physical disability (67 per cent) and chronic pain (68 per cent). One third had a mental health condition (34 per cent) and around one in ten had a severe hearing impairment (13 per cent). Under one in ten had a severe visual impairment (7 per cent) or a learning disability (5 per cent). Around two thirds told us they had some other kind of disability or long term health condition (64 per cent).

Table 4: Disability types of respondents (n=229)⁸

| Disability Types | % |
|--|----|
| Has a physical disability | 67 |
| Has chronic pain | 68 |
| Has a mental health condition | 34 |
| Has a severe hearing impairment | 13 |
| Has a severe visual impairment | 7 |
| Has a learning disability | 5 |
| Has another kind of disability or long term health condition | 64 |

⁸ The percentage is of total respondents, not disabled respondents. Respondents were able to select multiple disability types.

Half of respondents (50 per cent) said they were a carer.

Table 5: Caring status of respondents (n=227)

| Caring status | % |
|----------------------|----------|
| Carer | 50 |
| Not a carer | 48 |
| Prefer not to say | 2 |
| Total | 100 |

Of respondents who said they were carers, 86 per cent cared for an adult friend or relative. Three in ten was a carer due to old age (30 per cent). Two in ten cared for a child (23 per cent).

Table 6: Who do respondents care for? (n=113)

| Care status | % |
|----------------------|----------|
| Cares for an adult | 86 |
| Cares for a child | 23 |
| Carer due to old age | 30 |

Survey respondents took part from all 32 local authority areas in Scotland. The majority lived in an urban area (84 per cent).⁹

Table 7: Location of respondents (n=366)

| Location | % |
|-----------------|----------|
| Urban | 84 |
| Rural | 16 |
| Total | 100 |

Survey respondents who took part had experience of claiming or helping someone else to claim a wide range of benefits. The most common benefits claimed by survey respondents were Personal Independence Payment (99 per cent) and Disability Living Allowance (72 per cent). The least common benefits claimed were

⁹ 17 per cent of the Scottish population lives in a rural area. Scottish Government (2018). *Rural Scotland Key Facts 2018*. [Online] Available at: www2.gov.scot/Resource/0054/00541327.pdf

for Funeral Expenses (8 per cent) and Industrial Injuries Disability Benefit (1 per cent).

Table 8: Respondents benefit experience (n=249)¹⁰

| Benefit | % |
|--|----------|
| Personal Independence Payment | 99 |
| Disability Living Allowance | 72 |
| Carer's Allowance | 44 |
| Cold Weather Payment | 36 |
| Winter Fuel Payment | 35 |
| Discretionary Housing Payment | 27 |
| Scottish Welfare Fund | 21 |
| Attendance Allowance | 18 |
| Universal Credit | 18 |
| Severe Disablement Allowance | 18 |
| Funeral Expenses | 8 |
| Sure Start Maternity Grant | 26 |
| Industrial Injuries Disability Benefit | 1 |

More detailed demographic information on the Experience Panels as a whole can be found in *'Social Security Experience Panels: Who is in the panels and their experiences so far.'*¹¹

Personal Independence Payment Assessments

Previous assessment experiences

We asked respondents a series of questions about their previous PIP assessment experience. Three quarters of respondents (73 per cent) were currently in receipt of PIP and nearly one quarter (23 per cent) had helped someone else to apply for PIP.

¹⁰ Respondents had experience of applying for (themselves or someone else) or receiving these benefits within the last three years, but were not necessarily in receipt of the benefit at the time of the survey.

¹¹ Scottish Government (2018). *Social Security Experience Panels: Who is in the panels and their experiences so far.* [Online] Available at: www.gov.scot/Publications/2018/10/3083

2 per cent had received PIP in the past and 2 per cent were applying for PIP for the first time.

Table 9: What is your experience with Personal Independence Payment (PIP)? (n=379)

| | % |
|--|-----|
| I am applying for PIP for the first time | 2 |
| I currently receive PIP | 73 |
| I have received PIP in the past | 2 |
| I have helped someone to apply for PIP | 23 |
| Total | 100 |

Nine in ten respondents (90 per cent) had attended a PIP assessment before. Over half of respondents (57 per cent) had attended their own assessment, while just under two in ten (19 per cent) had attended an assessment to support someone else. 14 per cent had attended both their own assessment and to support someone else.

Table 10: Have you attended a PIP assessment before? (n=383)

| | % |
|---|-----|
| Yes, my own assessment | 57 |
| Yes, supporting someone else | 19 |
| Yes, both my own assessment and supporting someone else | 14 |
| No | 9 |
| Don't know | 1 |
| Total | 100 |

Where the assessment was

Just under seven in ten respondents (68 per cent) had their most recent assessment at an assessment centre. Three in ten (31 per cent) had their most recent assessment at home.

Table 11: Where was the most recent assessment that you attended? (n=348)

| | % |
|----------------------|-----|
| An assessment centre | 68 |
| At home | 31 |
| Another location | 1 |
| Total | 100 |

How the assessment went

Around four in ten respondents (46 per cent) felt there were positive and negative aspects to their assessment experience. Around four in ten (44 per cent) felt their assessment experience was negative overall, whilst around one in ten (11 per cent) felt their assessment experience was positive overall.

Table 12: How would you describe your assessment experience? (n=343)

| | % |
|--|-------------------|
| I felt my experience was positive overall | 11 |
| I felt there were positive and negative aspects to my experience | 46 |
| I felt my experience was negative overall | 44 |
| Total | 101 ¹² |

Assessments over the phone

We asked respondents a series of questions about the possibility of having an assessment over the phone. Respondents were split on whether they would feel comfortable having an assessment over the phone. Around four in ten respondents (41 per cent) said they would feel comfortable and around in ten (43 per cent) said they would not. 16 per cent said they did not know.

¹² Results are presented as whole numbers for ease of reading. Due to rounding, percentages may not add up to exactly 100%.

Table 13: Would you feel comfortable with having an assessment on the phone? (n=384)

| | % |
|------------|-----|
| Yes | 41 |
| No | 43 |
| Don't know | 16 |
| Total | 100 |

We asked respondents who said would feel comfortable having an assessment over the phone or that they did not know what time would be the best for them to have an assessment on the phone. The majority of respondents (89 per cent) said that between 9 am and 5 pm would be the best time for them to have an assessment over the phone. Of those respondents, over four in ten (44 per cent) said between 9 am and 12 pm would suit them, whilst four in ten respondents (45 per cent) said between 12 pm and 5 pm would suit them best. Only one in ten (10 per cent) respondents said that times out with 9 am and 5 pm would suit them.

Table 14: What time would be the best for you to have an assessment on the phone? (n=216)

| | % |
|----------------------|----|
| Between 7am and 9am | 2 |
| Between 9am and 12pm | 44 |
| Between 12pm and 5pm | 45 |
| Between 5pm and 8pm | 7 |
| None of the above | 1 |
| Total | 99 |

Of those same respondents, almost all (96 per cent) said they would be comfortable having an assessment over the phone in their own home. Around two in ten respondents said they would be comfortable at a building or office run by a charity (21 per cent) or at the GP office (18 per cent). 14 per cent said they would feel comfortable having an assessment over the phone at a Social Security Scotland venue. The least popular options were at a local authority office and a local library.

Table 15: Where would you be comfortable having an assessment on the phone? Tick all that apply (n=216)

| | % |
|--|----|
| In my home | 96 |
| At a building or office run by a charity | 21 |
| At the GP office | 18 |
| At a Social Security Scotland venue | 14 |
| Local authority office | 10 |
| My local library | 4 |
| None of these | 2 |

We asked those same respondents what devices they would use for the assessment over the phone. The most popular options were personal mobile phone (69 per cent) or landline (70 per cent). This was followed by personal PC or laptop (19 per cent) or tablet (22 per cent). Under one in ten respondents said they would use someone else's phone, tablet or laptop (7 per cent) or a phone that is available in a public area (8 per cent).

Table 16: What devices would you use to have an assessment on the phone? Tick all that apply (n=216)

| | % |
|---|----|
| My own landline | 70 |
| My own mobile phone | 69 |
| My own PC/laptop | 19 |
| My own tablet | 22 |
| A phone that is available in public areas (e.g. local authority site) | 8 |
| Someone else's phone/tablet/laptop | 7 |
| None of these | 1 |

Difficulties with an assessment over the phone

Most respondents thought there would be difficulties with having an assessment on the phone. Seven in ten of all respondents (72 per cent) thought there would be difficulties compared to 16 per cent who did not. One in ten respondents said they did not know.

Table 17: Do you think there would be any difficulties with having an assessment on the phone? (n=383)

| | % |
|------------|-----|
| Yes | 72 |
| No | 16 |
| Don't know | 11 |
| Total | 100 |

Of those respondents who said there would be difficulties with having an assessment over the phone, nearly four in ten (39 per cent) said the main difficulty would be expressing themselves properly. Over one in ten (14 per cent) thought the main difficulty would be not being able to see the assessor. Collectively, problems with call quality, signal issues, not being able to hear the assessor and finding it hard to speak loudly accounted for around two in ten responses (19 per cent).

Table 18: What do you think would be the main difficulty in having an assessment on the phone? (n=319)

| | % |
|--|-----|
| I find it hard to express myself properly over the phone | 39 |
| Other | 27 |
| Not being able to see the assessor | 14 |
| Not being able to hear the assessor | 8 |
| Problems with call quality | 5 |
| Problems with signal issues | 3 |
| I find it hard to speak loudly | 3 |
| I do not have access to a phone | 0 |
| Total | 100 |

Of those respondents who selected 'other' to indicate that they thought another issue would be the main difficulty in having an assessment over the phone, most respondents referred to a combination of the responses already listed. Many respondents said their health condition would be the main difficulty. For example, a few respondents explained that they would have difficulty holding a phone for a period of time or said that their hearing loss meant phone would not be an option. Other respondents explained that their mental health condition would be the main difficulty, with some stating that phone calls make them anxious.

“I get anxiety with being on the phone and have panic attacks afterwards.”

“Autism makes it very difficult to know how to speak on the phone, and I would feel rushed. I can't answer questions quickly. There's also no way to take a break.”

A few respondents said there would not be enough time to think over the phone, or that they may struggle to understand the assessor or respond in the way they wish to.

“Understanding the assessor and my being able to reply with exactly the right words.”

Some respondents said the main difficulty in having an assessment over the phone would be the lack of in person contact. These respondents considered body language and non-verbal indicators a vital aspect of communication. Many respondents said the main difficulty in having an assessment on the phone would be the assessor not being able to see them. These respondents felt that it was important that an assessor see them physically to get a full and accurate understanding of their health condition or disability.

“I would want visual confirmation that the assessor was actively listening and picking up on non-verbal input from me.”

“The assessor in my opinion, needs to see people in the flesh so they can see for themselves how the disability impacts a person.”

Without an in person interaction, some of these respondents felt that their assessment may be inaccurate, or certain aspects may be misinterpreted if conducted over the phone.

“Any point, no matter how well expressed, can be misinterpreted at the telephone. It is only by face to face that a proper assessment can be completed.”

“Not being able to see the facial expressions and body movements and language of person being assessed inevitably means fewer factors on which to base assessment and higher risk of misunderstanding and underestimating their issues. Vice-versa, not seeing assessor's face and body language can lead to less trust and less inclination to participate leading to lack of vital information.”

Other respondents felt that an assessment over the phone may be ‘impersonal’, whilst a few raised concerns about security.

“Misrepresentation of my true situation by the assessor.”

“Can’t be sure if it is a genuine PIP assessor.”

Assessment preferences

If applying for PIP for the first time, over half of respondents (54 per cent) said they would want to find out when being told they need an assessment. Just under half (47 per cent) said they would like this information before they apply. Just under three in ten respondents (28 per cent) said they would want to find out what happens in an assessment immediately after submitting their application. Around one in ten respondents said they would want to find out what happens in assessment the week (10 per cent) or day (8 per cent) before the assessment itself.

Table 19: If you were applying for PIP for the first time for yourself or someone else, when would you want to find out what happens in an assessment? Tick all that apply (n=378)

| | % |
|---|----|
| Before I apply for the benefit | 47 |
| Immediately after I have submitted my application | 28 |
| When I am told I need an assessment | 54 |
| The week before my assessment | 10 |
| On the day of my assessment | 8 |

Nearly half of respondents (47 per cent) said that a face to face assessment in their home would suit them best. This was followed by one quarter of respondents (24 per cent) who said a face to face assessment at a location near them (e.g. GP, Third Sector venue) and nearly two in ten (18 per cent) who said an assessment over the phone would suit them best. Face to face assessment at a Social Security Scotland venue was the least popular option, with just over one in ten respondents (12 per cent).

Table 20: If you had to have an assessment, which option would suit you best? (n=381)

| | % |
|---|----|
| Face to face assessment in my home | 47 |
| Face to face assessment at a location near me (e.g. GP, Third Sector venue) | 24 |
| Assessment over a phone call | 18 |

| | |
|---|-----|
| Face to face assessment at a Social Security Scotland venue | 12 |
| Total | 101 |

Home assessments

Of those respondents who said an assessment in their home would suit them best, seven in ten respondents (70 per cent) said this was because their disability, mental health or long term health condition makes it difficult for them to leave home. Just under seven in ten respondents (69 per cent) said they would feel more comfortable in their own home. One quarter (26 per cent) said an assessment in their home would suit them best because they would not need to spend time travelling. These findings are broadly similar to previous research with Experience Panel members on home visit appointments more generally, where the most common reason survey respondents said they would need a home visit was due to their disability, mental health or long term health condition (78 per cent). Around a fifth of respondents said caring responsibilities restricted them from visiting a Social Security Scotland office (22 per cent) with a further 16 per cent saying they would struggle with transport.¹³

Table 21: Why would having an assessment in your home suit you best? Tick all that apply (n=177)

| | % |
|---|----|
| My disability, mental health or long term health condition makes it difficult for me to leave my home | 70 |
| I would feel more comfortable in my home | 69 |
| I would not spend my time travelling | 26 |
| It would not cost me money to travel | 14 |
| There are poor transport links in my area | 12 |
| Other | 11 |
| I have caring responsibilities | 10 |

Of those respondents who selected 'other' to indicate another reason that an assessment in their home would suit them best, most responses referred to the existing themes above. Others said that a home assessment provided the assessor with a better understanding of their condition.

¹³ Scottish Government (2019). *Social Security Experience Panels: appointments and local delivery*. [Online] Available at: <https://www.gov.scot/publications/social-security-experience-panels-social-security-scotland-appointments-local-delivery/>

“I can demonstrate how I manage my conditions with aids etc. here, I am unable to do that elsewhere.”

Three quarters of respondents (76 per cent) said they would like to state their preferences for an assessment on the initial application form. Two in ten respondents overall (24 per cent) said they would like to tell Social Security Scotland their preferences after being invited to an assessment, either online, over the phone or by post.

Selecting assessment preferences

Table 22: How would you like to tell us about your preferences for your assessment, such as whether you want it at home, at Social Security Scotland venue or over the phone? (n=379)

| | % |
|---|-----|
| On the PIP application form | 76 |
| Online after receiving an invite to an assessment | 10 |
| Over the phone after receiving an invite to an assessment | 8 |
| By post after receiving an invite to an assessment | 6 |
| Total | 100 |

Assessment guidance

Nearly half of respondents (47 per cent) said Social Security Scotland’s website is the first place they would look for guidance about assessments with Social Security Scotland. The second most popular place to look for guidance would be at a support organisation e.g. Citizens Advice Bureau or Welfare Rights, with over one third of respondents (35 per cent) stating this. Combined, all other potential places to look for guidance about assessments were only chosen by under two in ten respondents (19 per cent). None were chosen by more than one in twenty respondents (5 per cent).

Table 23: Where is the first place you would look for guidance about assessments with Social Security Scotland? (n=379)

| | % |
|---------------------------------------|----|
| On Social Security Scotland’s website | 47 |

| | |
|--|-----|
| Support organisation e.g. Citizens Advice Bureau or Welfare Rights | 35 |
| Online forums | 5 |
| Other | 5 |
| An advocate | 4 |
| On the phone to Social Security Scotland | 3 |
| Family and friends | 1 |
| GP office | 1 |
| Total | 100 |

Of the respondents who selected 'other' to indicate they would look for guidance about assessments with Social Security Scotland elsewhere, most indicated a combination of the options listed above. A few respondents said they would look first to their carer for guidance.

Assessment support

Nine in ten respondents (89 per cent) said they would want to involve someone such as a family member, carer or advocate to support them during the assessment.

Table 24: Would you want to involve someone to support you in your assessment? For example, a family member, carer or advocate? (n=380)

| | % |
|-------|-----|
| Yes | 89 |
| No | 11 |
| Total | 100 |

Of those who said they would want to involve someone to support them at the assessment, seven in ten (70 per cent) said they would like to involve a family member. Half of respondents (51 per cent) said an advocate and over one third (35 per cent) said a carer.

Table 25: Who would you like to support you at an assessment? Tick all that apply (n=339)

| | % |
|-----------------|----|
| A family member | 70 |
| An advocate | 51 |

| | |
|-------------|----|
| A carer | 35 |
| Interpreter | 2 |
| Other | 10 |

Of respondents who said they would involve another person to support them at their assessment, most said they would involve a friend. Other responses included: social worker, welfare rights worker, support worker, an official from Citizen’s Advice Bureau.

Almost all respondents (94 per cent) said they would like the person to support them by being in the room or on the phone with them. Over one third (36 per cent) would ask their supporter to provide a written statement of support.

Table 26: How would you like the person to support you at an assessment? Tick all that apply (n=339)

| | % |
|---|----|
| I would want them in the room with me or on the phone with me | 94 |
| I would ask them to give me a written statement of support | 36 |
| Other | 10 |

Of respondents who indicated they would like the person to support them in another way, most said they would want the person to help them communicate or speak on their behalf. This including clarifying questions and helping them to remember to convey important information to the assessor. A few respondents said they would like the person to support them by remembering the assessment and discussion afterwards.

“I may wish them to speak on my behalf if I get confused or have sensory/mental impairment.”

“The person usually helps me to mention things that I forget or they can explain things better than me.”

“To help remember the information given to me or to help with my memory loss.”

Improving assessments

We asked respondents if there is anything else Social Security could do differently when it takes over responsibility for PIP assessments. Many of the themes covered by respondents in this question mirror and confirm those from previous Experience Panels research on assessments.¹⁴ These findings have already informed decisions about assessments which were outlined in the introduction:

- Use medically trained health and social care professionals to conduct assessments. Assessors should have in-depth knowledge of a particular clients' health conditions.
- Assessments should not be carried out by an external, third party organisation.
- Assessments should be conducted in a way which treats people fairly and respectfully and assessors should believe and listen to clients.
- Assessments should be reported on truthfully and accurately. Assessments should be recorded and clients should be provided with a copy of the assessment report for checking before it is formally submitted.
- Reduce assessments if medical evidence can be provided at the application stage to show qualification for the benefit.
- Ensure assessment spaces are accessible, close to home and friendly and offer flexibility to book, choose and change assessment appointments.

Digital devices and services

Finally, we asked respondents about their access to a range of devices and services. Nearly all respondents (96 per cent) have access to an internet connection in their home. Landline, laptop or computer and smartphone were selected by around seven in ten respondents. Only three in ten respondents (30 per cent) have access to a webcam.¹⁵

Table 27: Which of these do you have access to in your home? Tick all that apply (n=376)

¹⁴ Scottish Government (2018). *Social Security Experience Panels: Personal Independence Payment discovery - visual summary*. [Online] Available at: <https://www.gov.scot/publications/social-security-experience-panels-personal-independence-payment-discovery-visual-summary/> Scottish Government (2018). *Social Security Experience Panels: Personal Independence Payment health assessments*. [Online] Available at: <https://www.gov.scot/publications/social-security-experience-panels-personal-independence-payment-health-assessments-main-report/pages/1/>

¹⁵ Experience Panel members received invitations to participate in this research through their preferred choice of communication method: email, post, telephone, text messaging (SMS). As noted, these results should be regarded as being reflective of the experience and views of the participants only, and are not indicative of the views of a wider Scottish population.

| | % |
|---------------------|----|
| Internet connection | 96 |
| Landline | 78 |
| Smartphone | 77 |
| Laptop or computer | 75 |
| Tablet | 53 |
| Webcam | 30 |

Just under three in ten respondents (28 per cent) said that they use assistive technology.

Table 28: Do you use any assistive technology? (n=381)

| | % |
|-------|-----|
| Yes | 28 |
| No | 72 |
| Total | 100 |

Of those respondents who said they use assistive technology, the various types are listed in table 29. The most common responses were a mobility stick (50 per cent), and a magnifying glass (41 per cent), followed by screen magnification software (21 per cent). The least common responses were literacy software (7 per cent) and assistive joystick/trackpad (5 per cent). Head pointer and eye tracking keyboard were not selected by any participants.

Table 29: What kind of assistive technology do you use? Tick all that apply (n=101)

| | % |
|-------------------------------|----|
| Mobility stick | 50 |
| Magnifying glass | 41 |
| Screen magnification software | 21 |
| Other | 19 |
| Screen-reader | 16 |
| On-screen keyboard | 16 |
| Speech input software | 13 |

| | |
|-----------------------------|---|
| Literacy software | 7 |
| Assistive joystick/trackpad | 5 |
| Eye-tracking keyboard | 0 |
| Head pointer | 0 |

What's next?

This research, along with wider research with citizens and Health Care professionals, will be used to inform the design of the new consultations service.

The survey has given the service design team a greater understanding of what citizens need from the future consultations service. It helps confirm the need to design a service that provides choice in how clients apply and communicate, reduces the need for unnecessary travel, is tailored to the individual and encourages support networks to be involved.

This survey also helps identify the design challenges to solve next, so Social Security Scotland can deliver a service that meets user's needs. There will be more research with Experience Panel members, to help create and test designs for the future service.

How to access background or source data

The data collected for this social research publication:

- Are available in more detail through Scottish Neighbourhood Statistics
- May be made available on request, subject to consideration of legal and ethical factors. Please contact socialsecurityexperience@gov.scot for further information.
- Cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.



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