

Annex A

[H1] Advocacy service for clients

Clients with a physical disability, learning disability or mental health condition might find it difficult to express their views and needs when communicating with Social Security Scotland.

These clients have the right to access an independent advocacy service for free. [H2] What an advocacy service is

Advocacy services support people to have their views or concerns heard when applying for benefits and to make sure their needs are understood. They do not give advice.

Advocacy services are provided by an advocate who is independent. This means the clients advocate cannot be a friend or family member.

[H2] What an advocate can do

An advocate can help the client:

- speak up and make sure their views and needs are understood
- be fully involved and able to make decisions
- ask questions and get the information they need
- understand their rights relating to Social Security Scotland benefits
- express their rights, views, and wishes including what they want to achieve

They will not:

- give the client advice
- make decisions for the client
- speak for the client if they're able to speak for themselves, unless the client asks them to give their own views or opinions

An advocate is different from an appointee. An appointee will act on the clients behalf if they cannot act for themselves. This includes:

- corresponding with Social Security Scotland
- getting the benefit payment
- being responsible for telling Social Security Scotland about any changes for ongoing benefits

Read the 'If someone else is acting for the client' guidance to find out more.

[H2] When the client can ask for an advocate

Clients can ask for the help of an advocate at any time during the application process, including redeterminations and appeals.

[H1] If the client wants an advocate

If the client tells you they want help from an advocate you need to:

1. Tell the client their details will be passed to an advocacy service who will call them within 5 working days.
2. Remind the client this is a free service.
3. Tell them the advocacy service will be by telephone or video call only until further notice because of coronavirus (COVID-19).

4. Update the Client Contact screen in SPM with a note – ‘Referred to advocacy service on DD/MM/YYYY’.

You need to create a prospect person on SPM if the client does not have a record already.

[H2] Contacting the advocacy team

If the client wants to be referred to an advocacy service:

1. Create a task in SPM using the heading Advocacy Referral.
2. Assign the task to your team manager.

Your team manager will:

1. Access the task.
2. Access the shared folder in eRDM.
3. Update the referral spreadsheet with the client’s name, date of request, phone number, date of birth, address and SPM client reference.
4. Email the advocacy team at socialsecurityadvocacy@gov.scot with the new line number updated on the spreadsheet. Use ‘New request for advocacy entered in spreadsheet’ as the email subject. The advocacy team will pass on the clients details to a suitable advocacy service. They’ll update the spreadsheet to note the client’s been referred.

[H2] If the client has not had a call back

If the client calls to say they haven’t had a call:

1. Update the Client Contact screen in SPM with a note – ‘Chased advocacy service on DD/MM/YYYY’
2. Create a task in SPM using the heading Advocacy Referral.
3. Assign the task to your team manager.

Your team manager will:

1. Update the eRDM spreadsheet with a note - ‘Chased on DD/MM/YYYY’
2. Email the advocacy team at socialsecurityadvocacy@gov.scot to tell them the line number updated on the spreadsheet.

[H2] If the client changes their mind

If you get a call from the client and they no longer want to be referred:

1. Update the Client Contact screen in SPM with a note – ‘Withdrew advocacy request on DD/MM/YYYY’
2. Create a task in SPM using the heading Advocacy Referral.
3. Assign the task to your team manager.

Your team manager will:

1. Update the eRDM spreadsheet with a note that the client does not want to be referred.
2. Email the advocacy team at socialsecurityadvocacy@gov.scot to tell them the line number updated on the spreadsheet.

[H2] If the client is unhappy with the advocate

If you get a call from the client who is unhappy with their advocate:

1. Update the Client Contact screen in SPM with a note – ‘Client advised unhappy with advocacy service on DD/MM/YYYY’

2. Create a task in SPM using the heading Advocacy Referral.
3. Assign the task to your team manager.

Your team manager will:

1. Update the eRDM spreadsheet with a note that the client is unhappy with their advocate.
2. Email the advocacy team at socialsecurityadvocacy@gov.scot to tell them the line number updated on the spreadsheet.