Identifying potential benefit entitlement

A training course by Mary Nash

Aims

To improve quality of service to clients by increasing the speed and accuracy of identifying potential benefit entitlement. This is done by considering benefits in a logical and structured manner and understanding what details you need to explore with the client in order to use the information system to identify potential entitlement.

Who for?

Trained generalist advisers, caseworkers, advice session supervisors etc. with experience of advising on benefits. Trainees should have completed the benefits e-learning before attending this course and have at least 6 months experience of working with clients.

This course can be delivered to groups of up to 15 people, but there is plenty of practical work and a range of exercises to help the learning process. Attendees will need paper and pens and there needs to be space for posters to be attached to the wall.

Timing

4 ½ hours (normally 10-2.30) including a coffee and short lunch break

Learning Outcomes

By the end of this course, attendees should be able to:

1. Explain how all means-tested benefits are calculated
2. Identify at least 10 different pieces of information needed from a client to assess their potential benefit entitlement
3. Explain why each piece of information is needed, and which benefits might be considered for each different circumstance
4. Justify the order in which to consider benefit entitlement
5. Explain what 'overlapping' means
6. Identify at least 2 benefits that might be 'passported'

Topics

- Warm-up: reminder of all the benefits in the system
- The principles of calculating means-tested benefits
- Gathering information
    - What do you need to know to assess entitlement
    - Understanding why you need find out each piece of information
- The order to consider benefit entitlement
- More about specific benefits
- The effect of benefits on others
    - Overlapping
    - Passporting