

OPG Annual Customer Survey

Access to funds review service

We targeted

- ✓ 42 withdrawers appointed under the access to funds scheme selected for review
- ✓ 16 replied = 38%
- ✓ Questionnaires sent by e-mail or by letter

What about our service? You said...

15 said that we provided enough information about our role

14 said they found our booklet 'A Guide for Withdrawers' useful

10 said they found the section useful at the end for noting items of expenditure

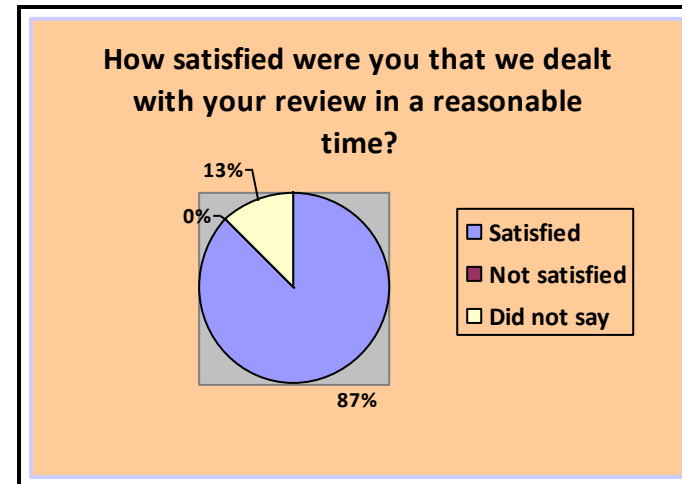
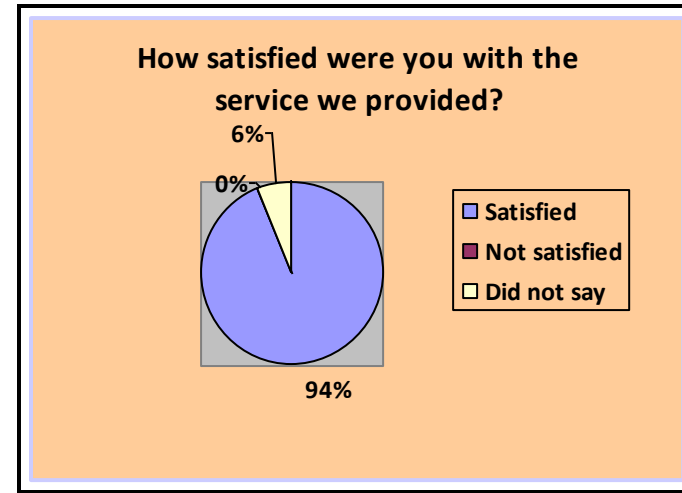
14 knew they had to keep receipts to vouch for expenditure from the designated account

16 said we made it clear that we might contact them to review the designated account

2 said we did not provide the outcome of the review in a way that was easy to understand

11 have not visited our website

Levels of customer satisfaction



We asked if we could improve the booklet. You said...

- A bit more space for noting expenditure might be useful
- As I understand the requirement to keep receipts only applies to expenditure of £50 or more and yet the booklet advises that a record is kept of any payment “no matter how small”. There is a degree of inconsistency in all that.
- There needs to be more space to record transactions. Need to send new ones each year. I am having to record now on a sheet of paper

Is there anything else we could improve? You said...

Speed up the time taken to return paperwork and include a new guide so that expenditure can be recorded in it

What do you think we do well?

I find it easy to contact by phone with the number giving direct access to the person dealing with the case.

I think you perform the function set to you by protecting the vulnerable person well but still making things easy to set up in order to look after their day to day expenses.

Communicate

Very polite, friendly and helpful staff

The ATF team provides excellent support and advice when requested

Next steps

We will publish the summary

Our actions: we will.....

1. Review the “Guide for Withdrawers” booklet with a view to providing clearer guidance in relation to the keeping of receipts and will look at providing additional space so that it is easier to record expenditure.