

OPG Annual customer survey 2016

Lay financial guardian survey

Discharge process

We targeted

- 200 lay financial guardians who applied for discharge from April 15 – May 16
- 56 replied = 28% response rate
- Questionnaires sent out via e-mail and post [43 replied by post]
- We were interested to find out if our letter and communications with lay financial guardians could be better. We asked for opinions on whether the annual account from should include a section covering discharge.

About the process, before applying to be discharged you said...

32 did not know that there was a discharge process

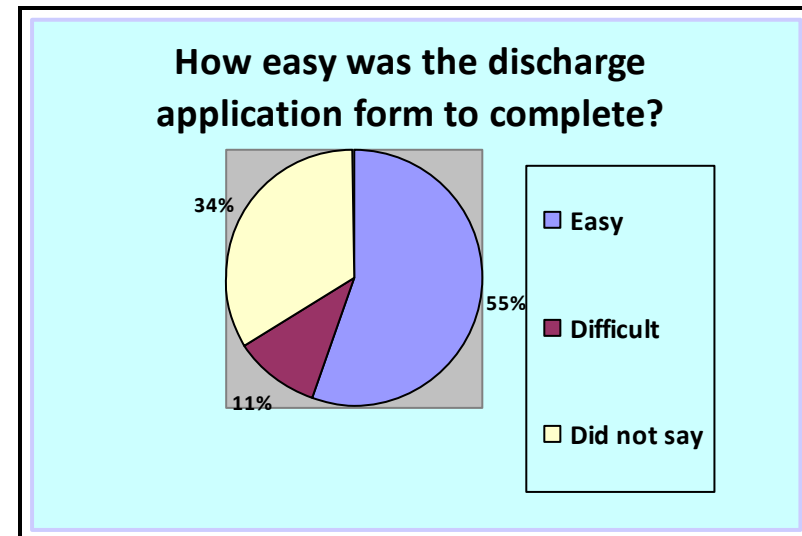
About the application form, you said ...

43 would prefer the discharge form to be included in the final account form

45 said we made it clear in our letter the purpose of the executor's/receivers receipt

4 joint guardians said it was not clear they each had to submit a discharge form

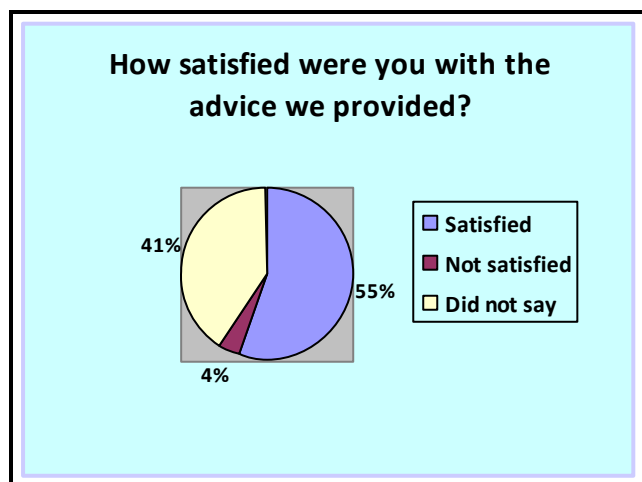
43 said they would have preferred the discharge form to be included with the final account



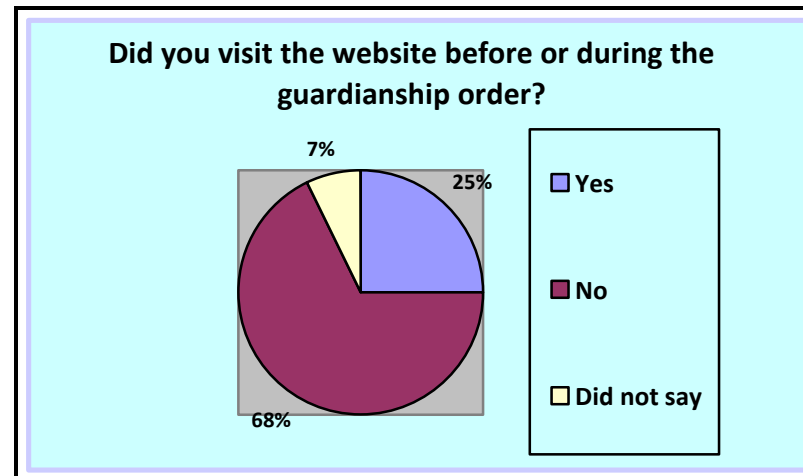
At any time during or before the guardianship order did you contact us for any advice or assistance?

- 28 said they had contacted us, examples of the enquiries are:
- Death of an adult brought guardianship to an end
- Audit issues
- Sale of sister's house and outstanding care home fees
- How detailed the inventory needed to be, which receipts to keep
- About the executor's receipt
- Help with account
- Advice on account keeping
- To make sure I was sending the correct documents

Levels of customer satisfaction



About the website



About the website, you said...

It was very helpful

Not to assume all guardians have access to the internet or computer

Yes, but lots of information to go through

Yes, downloadable forms that allowed electronic completion

Not very intuitive, particularly if hunting for publications or forms

How could we improve the website?

- Brief headings to highlight issues then re-direction to more information
- Have alternative versions of documents for users who don't have Microsoft word
- Better direction to forms and publications
- More plain English and less professional language

Looking back, what could we have done differently?

- Pay one home visit to elderly guardians.
- No. You made it very clear about the process & timings.
- Decrease our time to audit accounts.
- A lawyer would have been better then they know what it's all about because I didn't.
- Didn't understand what was happening. Explanation not very clear as I am 82 years old
- No, I was happy with the conversations I had
- Highlight issues most relevant to the guardian i.e. if you need to sell property
- No everything ok just a bit slow
- Perhaps an example sheet for filling in yearly forms or layout process at start. Hand this form out sooner.
- The information about inventories was conflicting
- More information on which receipts (type and quantity) had to be kept
- By treating bereaved spouse with dignity and respect
- Always helpful when needing advice
- Dealing over the telephone I found difficult, especially at a time when you are very upset
- An extremely lengthy process for discharge could be made quicker and easier for the average person to understand, cut out jargon
- Speed up annual review processing

- Maybe a faster check on submissions. I submitted all that I understood to be required, waited months then was advised that I was required to submit a further form within a short timeframe

Next steps

We will publish the summary

Our actions: we will.....

1. We will update our letters and literature to better inform guardians that the website is available and is a useful source of reference.
2. Carry out a review website and guidance to make sure the content is in plain English and easy to follow.
3. Provide a diagram outlining all the stages in the process and add to key leaflets for those thinking about applying to become a guardian. Consider adding something similar to other guidance for financial guardians.
4. Make it clearer in our letters, literature and website who needs to apply for discharge.
5. Consider including the discharge form with the final account.