

OPG Annual customer survey 2016

Lay financial guardian survey

Simplified account form

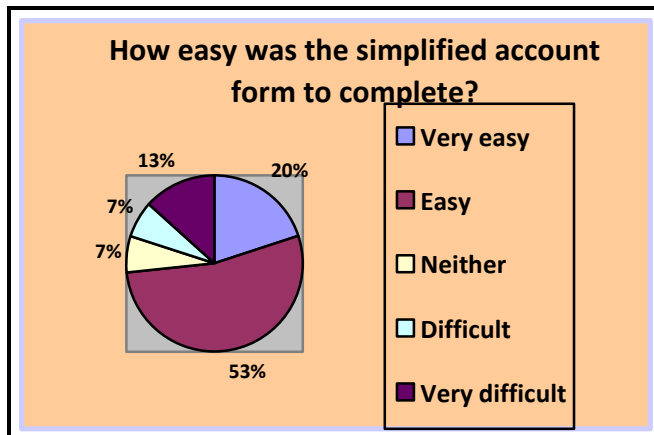
We targeted

- 70 lay financial guardians with experience of using simplified account, some had experience of using the full account form
- 15 replied = 21% response rate
- Questionnaires sent out via e-mail and post [10 replied by post]
- We were interested to find out feedback on the simplified account form

About our annual letter ...

15 said we provided enough information about what was required and the date the account was to be submitted

About the simplified account form, you said ...



What do you like about the form? You said ...

- Simpler and less time consuming
- Much simpler than previous one
- Perhaps as a novice I felt incapable, though ok for a confident person
- Clear layout and completion requirement obvious
- Easy

What didn't you like about the form? You said ...

- Pensioner's trying to work out yearly incomes when they keep changing especially in April
- The look of it – did not look like an official form
- Very limited amount of information recorded
- Too many complicated questions

How could we improve the form? You said ...

- If questions (6) and (7) were moved to the foot of page 1, more space would be available for questions (3) (4) and (5). Horizontal ruling in these sections would be beneficial.
- Although the form has an area for income providers and bank accounts held, it doesn't have an area for how much is received or held and doesn't give an overview of the position.
- Happy the way it is.

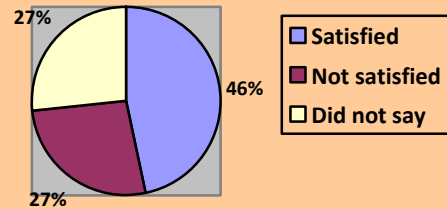
About the guidance notes ... You said...

14 said the notes were clear on how to complete the form

14 said the notes were clear about the supporting documentation to send

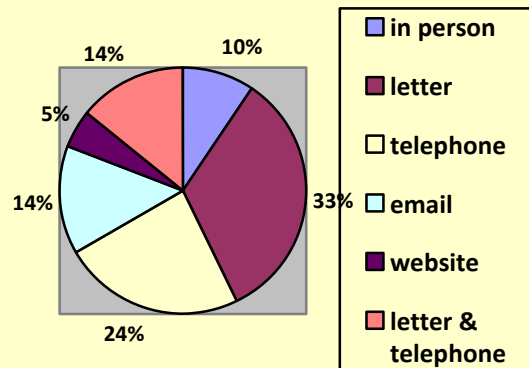
Levels of customer satisfaction

How satisfied were you that we dealt with your account within a reasonable time?

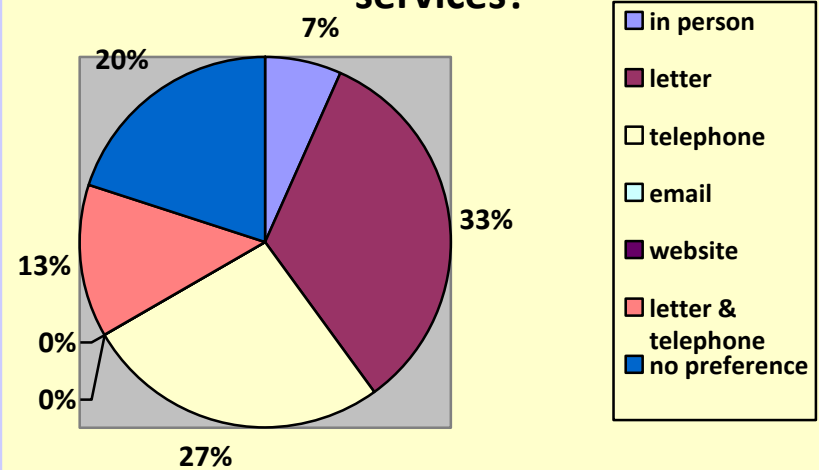


We asked about how we communicate with you...

How do you access our services?



How would you prefer to access our services?



We asked how we could improve our communication with you ...

- 6 said we didn't keep them up to date with the progress of their account
- You said there is too long a delay in receiving our decisions regarding the account
- You said you only received an email on submission to advise of approximate time frame and again when it has been reviewed, nothing in between
- You said not really. You realised there is a huge backlog, but the delay between submission and final verification seems excessive

Have you used our website?

10 haven't used the website

How can we improve our service?

- My income and outward very seldom vary so I think they should be carried from year to year without having to fill in all these forms
- Continue to have patience with people phoning. Continue to give plenty of time for account to be submitted
- Website is not that intuitive

What do you think we do well?

When I contacted your office personnel have been very pleasant to deal with

On telephone, polite and helpful

Patience s last year of accounts was terrifying for me. Should have involved an accountant sooner

Provide straight forward and simple guidance and forms for completion, making the process very pain free.

Phone replies are always helpful

Next steps

We will publish the summary

Our actions: we will.....

1. When developing new case management system consider building in a step to keep customers informed of progress of account.
2. We will let guardians know that our processing times are updated weekly and can be viewed on the news page of the website.
3. We will review the format and look of the simplified account form.
4. We will clarify in our letter, guidance and website the purpose of this form and highlight that limited information is all that's required.
5. We will carry out a feedback exercise to find out how useful / helpful the website is and what needs improving.