

Citizens Advice consumer service – data collection guide for partners

Overview

Consumer service advisers record all case details on our case management system, Flare21. This document is designed to outline the fields advisers complete when responding to a client by telephone or email.

Flare21 is a system made up of a number of interrelated databases, allowing consumer service advisors to record client and trader information and case details.

An advisor will collect data/information from a client calling the service and input this information to complete data fields and codes. Codes are used to organise data entry for reporting.

Some of the above data fields will be mandatory; this will mean that an advisor will not be able to save any part of the case without inputting some data in the required field/fields.

All of the data is sent in either a referral or notification as well as being added to the Central Data Warehouse (CDW) which is accessed via the Partner Portal.

While not all cases will contain all fields of data, this guide should provide you with some insight into the types of data you should frequently encounter when analysing consumer service cases. If there are a number of cases without a particular field as outlined here, please contact the consumer service operations team by email (operations@citizensadvice.org.uk) and we will endeavour to assist.

Additional notes

If certain information is not available the advisor should add an explanation to the case notes (such as “no trader information”)

Advisors will only use 'AnonAG or AnonCAS ' where a client requests to remain anonymous. i.e they do not wish to provide any personal details.

Some clients do not wish to be anonymous but just decline to give details of their name, address and/or other contact information that would normally be captured. In these circumstances advisors will record the information provided in the appropriate data field and leave all other fields blank. For example, the client agrees to give their telephone number but not their name and address - the data fields for client name and

address information would be left blank and the advisor will note in the case notes the client did not want to leave these details.

Flare21 - General consumer data/code collection fields

Description of the case	Mandatory field
CC Contact centre – case reference number	Auto populated
Case type – Criminal, Civil, Signpost.	Advisor selection
Goods and services - Parent and subcategory code (e.g (AB) Home	

maintenance and Improvements as the parent code and AB10 Fitted Kitchens, as the sub cat code)	Mandatory field (Trader complaint cases only)
Complaint type –As above Parent and subcategory code (01 Defective Goods as the parent code and 01D Breach of contract as the sub cat code)	Mandatory field (Trader complaint cases only)
Method of sale	Mandatory field (Trader complaint cases only)
Country of trade	Advisor selection
Preferred contact method (for the client)	Advisor selection
Sensitive case	Auto populated
Green Deal (i.e. if case related to sale or supply if goods/services under Green Deal)	Mandatory field (Trader complaint cases only)
Survey consent and referral consent	Advisor selection
Purchase date and Payment method	Mandatory field (Trader complaint cases only)
Amount value of trade	Advisor selection

Flare Energy data collection fields

Description of the case	Mandatory field
CC Contact centre – case reference number	Auto populated
Case type	Advisor selection
Issue code – Parent and subcategory code ((BE) Billing Error as the parent code and BE03 Back-Billing/Catch-up Bill Received, as the sub cat code)	Mandatory field (Energy cases only)
Payment method	Advisor selection
Selling method	Advisor selection
Company contacted	Advisor selection
Date of 1 st Contact	Advisor selection
Supply type	Advisor selection

Off Supply	Advisor selection
Smart Meter	Advisor selection
Potential Vulnerable/urgent	Auto populated
Survey consent and referral consent	Auto populated
Company complaint reference	Advisor selection

Flare Post data collection fields

Description of the case	Mandatory field
CC Contact centre – case reference number	Auto populated
Case type	Advisor selection
Issue code – Parent and subcategory code ((DM) MPS/Direct Mail Opt-out Schemes (failure to stop unwanted post) the parent code and DM01 Receiving unwanted mail, as the sub cat code)	Mandatory field (Post case only)
Product	Advisor selection

Mail contents	Advisor selection
Value of contents	Advisor selection
Company contacted	Advisor selection
1 st company contacted	Advisor selection
Difficulty with RM CHP	Advisor selection
Referral and Survey consent	Auto populated
Potential Vulnerable/urgent	Auto populated
Service start and service end	Advisor selection
Cost of service	Advisor selection
Date of posting	Advisor selection
Company complaint reference	Advisor selection