Updating service partner information v1.6

Citizens Advice consumer service

July 2021

Document information

Procedural summary information				
Updating service partner information (consumer operations staff, delivery centre staff, and managers and service partners)				
The purpose of this document is to detail the process for changing service partner information, including referrals protocols, with Citizens Advice consumer service				
Procedural leads: *Operations manager*				
Change process:				
Associated processes: *Duty business process Company Referral Process, Energy and Post.*				

Modifications

Version	Name	Page(s) modified	Type of modification	Date
1.0	Tom Ballard			02/02/2012
1.1	Lydia Anderson		Baseline from transition version 0.8	30/03/2012
1.2	Jess Hawker-Meadley	All	Business process review	25/08/2015
1.3	Jess Hawker Meadley		Inclusion of energy supplier recording	21/03/2017
1.4	Leanne Dullard	All	Business process review	06/07/2018
1.5	Emma Saunders		Business process review	10/06/2020
1.6	Lynda Clark		Business process review	18/05/2021

Distribution List

Name	Organisation	Purpose	Date

Contents

1.0 Quick reference

Flowchart:

Service Partner information is stored on the RAST
→
Protocol is reviewed- does it need updating?
→ No → Protocols are checked regularly or as necessary
↓ Yes
Process
→ Minor changes → Approved within 1 working day → End of process
→ Major changes → Service partner provides explanation and named contact to discuss any changes. → Approved within 30 working days and inform contact centres of any relevant change → End of process
→ Temporary changes → Service partner provides explanation and named contact to discuss any changes. → Approved within 1 working day and inform contact centres of any relevant change → End of process

2.0 Main procedure

2.1 Background and introduction

2.1 Service partner information is stored on the referral agency search tool (RAST). This information is known as a "protocol" and contains public contact information and internal confidential contact information for all service partners. Where appropriate/available it also contains details of referral protocols.

2.1.2 There are protocols for Trading Standards Services, Energy suppliers, Postal Companies, Alternative Dispute Resolution providers, Competent Authorities, Arbitrators, Environmental Health and others. In this document these are referred to as Service Partners

2.1.3 Operations staff have shared responsibility for receiving contacts from Service Partners and delivery centres. There is a rota for service support staff to be identified as a duty officer each day. The Duty officers maintain contact with Service Partners using the duty inbox (operations@citizensadvice.org.uk) and telephone number 0300 5000 922. References in this process to the duty inbox or duty phone are to these two points of contact.

2.2 Process for Service Partners

2.2.1 Service Partners are encouraged to use the RAST to communicate to advisers about the service offered and make any changes to that service known to keep them as up to date and accurate as possible for the benefit of clients.

2.2.2 Service Partners will make the required changes to their protocols and submit these changes to the Operations team for review and approval as described below.

2.2.3 Service Partners can access a user guide for making changes on the RAST and this can be found on the partner portal under the documents tab. This describes how to update each section, what is needed on the TSS and energy protocols and how to upload documents.

2.2.4 Service Partners can request new users for the RAST by contacting the duty officer. This can be done by emailing the operations inbox. If the new user also needs reporting access, a new partner portal user form needs to be completed and sent across by the service partner Business Administrator.

2.2.5. For Service Partners without access to the RAST, changes should be communicated to the duty officer as relevant either by phone or through the inbox.

2.3 Protocol reviews

2.3.1   Service partners are given access to amend their own protocol and asked to check whether all of the information and details are up to date and that any referral or supplementary information is still relevant.

2.3.2 Once changes are made to protocols on the RAST these are then reviewed by the operations team. Changes are approved or rejected. If a change is approved this is instantly live and is available for viewing by the consumer service advisers.

2.3.3 Changes may be rejected on the grounds of formatting, clarity or requirements. Operations staff can check grounds for rejection by using the duty business process or checking with a team member.

2.3.4 Within the RAST when reviewing changes there is the option to explain why a change has been rejected. This should be used to tell the Service Partner how to modify the change.

2.4 Protocol changes

2.4.1 Where possible all updates to protocols should be completed through the RAST by the appropriate Service Partner. However this process recognises that this may not always be possible for example in cases of partner closure, systems being offline or new services. This process looks at the procedure for minor, major and temporary changes.

2.4.2 Minor changes can be made by Service Partners by using the RAST. These changes could feature under any section of the protocol. These include changes to contact information (public or Citizens Advice contacts), changes to additional services, company debt pathway or complaints procedure. For Operations staff this will mainly involve reviewing changes made to the RAST. Minor changes to protocols will be approved within 1 working day of receipt.

2.4.3 Major changes include changes which involve the amendment of the RAST or are changes that by their nature require consultation within the Operations team. This will include changes to trading names, referral pathways, referral protocols and any partner merges. Any major requests should also be accompanied with the telephone number of a contact authorised to discuss the

protocol on behalf of the service partner. For Operations staff this will mainly involve reviewing changes to the RAST but may include setting up a new RAST protocol. We aim to complete any requests for major changes within 5 working days of receipt.

2.4.4 In instances when a major change involves alterations needed to Flare, this requires a longer notice period. This is usually things like a Trading Standards merger. As a result of this, the service level agreement for these changes are 30 working days of receipt. If a Service Partner is not sure what level of notice for change to give, please contact the duty officer.

2.4.5 Temporary changes are defined as changes to the protocol which are expected to last no longer than 1 month and would normally occur as a result of an unexpected incident, e.g. staff sickness or systems failures. Requests for temporary or emergency changes can either be made directly on the RAST with approval from to the Service Support team or by contacting the Service Support team directly. This must be accompanied with a brief explanation of the reason for the changes, details of a key contact telephone number and full details and dates of the changes required. In these circumstances we will endeavour to approve all necessary changes within 1 working day of receipt of the request.

2.4.6 Following a review of any of the changes to a protocol, the Operations staff may wish to highlight the change in protocol to the centres. This could involve situations like an energy company changing their referral (Mid Call Transfer) phone number. If this is to be communicated this should be completed within 1 working day of the changes being approved.

2.5 Process for delivery centres

2.5.1 Delivery Centres should ensure that the RAST is their first point of reference for checking Service Partner referral contacts.

2.5.2 Delivery Centres should ensure all staff working on the Citizens Advice consumer service who need logins have them and are able to use the RAST effectively.

2.5.3 Delivery Centres should complete the "user request form" on the Consumer knowledge base for new advisers to access the RAST. 10 working days should be allowed in order for these requests to be completed in time.

2.5.4 If there are any inconsistencies, incorrect or out of date information on the protocols, then this should be escalated to the duty officer using the duty inbox or duty phone.

2.6 Process for Operations Staff

2.6.1 The Operations team and service support staff will be given Admin access to the partner portal and RAST.

2.6.2 Admin access to the RAST involves approving and rejecting RAST changes and creating new RAST protocols. This access also allows Operations team and service support team to reset passwords, set up new users and lock old user accounts.

2.6.3 Instructions to conduct the admin functions of the RAST reviews can be found within the duty manual. This includes what is expected within a protocol entry and new user password resets.

2.6.4 Requests for protocol changes will come to duty through the usual duty process including by phone or email. Temporary changes may come as a result of a phone call- which is able to be actioned by Operations and service support staff. Major changes must come in writing. Minor changes may come by email but are encouraged to be completed by directly updating the RAST.

2.6.5 RAST updates will send a notification to the duty inbox. These should be reviewed within the agreed timescales and filed within the appropriate folder within the inbox.

2.6.6 User requests that include new users should be made by email to the duty inbox. If the new user also needs reporting access this request must come on a new user form and be sent by the Business Administrator. Changes to an account such as locking the account or resetting the password can come by the duty phone or inbox and are to be actioned within 2 working days.

3 Adding service partners

3.1 Adding energy suppliers to Flare

3.1.1. A supplier must be recorded on each energy case in Flare. There is a list of suppliers in a drop down menu that must be selected by the adviser for the case. This list is managed centrally and can be updated with requests to IT. If a

supplier is not on the list there is the option to use "other" and overtype the supplier's name.

3.1.2. From time to time a change in this list of suppliers is identified by the data users (listed in section 3.1.4). When this is identified this is escalated to Operations. If the change relates to a white label there is a naming convention where the licenced partner is in brackets, for example Ebico (Robin Hood).

3.1.3. Operations will place a request with IT by emailing support@citizensadvice.org.uk to add them to Flare. The request must also include adding them to the test and training regions on flare along with webmail forms.

3.1.4. Once the request has been accepted by IT and a change date is agreed this is then communicated with data users. Data users include:
- Energy Policy Team
- Data Unit
- Ofgem
- Ombudsman Services: Energy
- Extra Help Unit
- Citizens Advice Central Management Information Team
- Citizens Advice consumer service delivery centres for energy

3.1.5. IT will update Operations with the status of the change. Once it is live this is then checked by Operations to ensure it is visible on webforms and Flare and an email is sent to the data users listed in 3.1.4 to confirm the change is complete.

3.2 Adding new energy referral partners

3.2.1. On occasion suppliers are added as referral partners. This is agreed in line with the **Company Referral Process, Energy and Post.**

3.2.2. Once a supplier is identified as a new referral partner an initial meeting is set up to talk through the process. This will involve explaining the **Company Referral Process, Energy and Post,** giving an overview of referrals, the RAST, the Secure Post Office (SPO) and mid call transfers (MCT). If the new referral partner is a white label the contacts are with the licenced partner named in brackets for example with Ebico, contact is with Robin Hood.

3.2.3. Following this meeting the supplier will send to Operations the following information:
- Confirming how they would like their name displayed on the systems
- Identify an email address to receive referrals and case notes to
- Identify an email address in which to receive reconciliation reports (if different to above)
- Named colleagues who will have access to edit the RAST protocols (providing names and emails of these staff)
- A free phone number for mid call transfers

3.2.4. Once Operations have this information the following steps can be completed:
- Confirm the correct usage of the supplier name on Flare, Webforms and RAST. If this is incorrect in Flare or webforms, request changes through IT or amend RAST as per duty process
- Place request with IT to create referral pathway, including SPO account and reconciliation reports and agree a date that this is completed
- Create RAST editor accounts for supplier protocol for named contacts as per **Duty Business Process**. Send the account logins to the named staff and send the "RAST User guide".
- Ensure that all staff emails are recorded on Operations distribution lists, for example supplier liaison meetings and the contact spreadsheet.

3.2.5. Once the SPO account is set up the login details will be sent from IT to operations. Operations can then send this to the supplier for them to log in. This will be how they receive case notes and email referrals.

3.2.6. IT will work with the Flare supplier (Civica) to set up the referral routes into the SPO. Civica will need to apply the configuration changes in order for the changes to be live. IT should raise this as a priority 3 call and state that is completed in 3 working days as agreed. Once this is set up IT will let Operations know. Operations will send a test case to the referral partner to ensure this works. If it doesn't this must be escalated to IT.

3.2.7. Once the referral is received by the supplier and the name is correct on Flare and webforms, the supplier must complete their RAST protocol. It is important that referral guidance is completed such as service level for email referrals and a freephone number for mid call transfers.

3.2.8. After the protocol is completed, the mid call transfer line is tested. If this successfully connects, the referral process is ready to go live. A go live date is agreed between the operations team and the supplier and this is communicated to the data users listed in 3.1.4. Please note for white labels the RAST protocol should point to the licenced partner protocol for example with Ebico the protocol will direct advisers to Robin Hood.

3.2.11. Once the referral partner is live they are encouraged to give feedback on cases as per the **Managing Service Partner Feedback** process.

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