Updating service Partner Information
Document information

Procedural summary information

Updating Service Partner Information [consumer service Operations staff, contact 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

Distribution, sign off and version control

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<tr>
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<td>Tom Ballard</td>
<td>Citizens Advice</td>
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<td>02/02/12</td>
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<td>1.1</td>
<td>Lydia Anderson</td>
<td>Citizens Advice</td>
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Document information

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2. Second section – Main procedure
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. Section two – Main procedure

2 Background and introduction

2.1. Service partner information is stored on the referral agency search tool (RAST). This information is known as “protocols” 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 Contact Centres. There is a rota for staff to be identified as a duty officer on each day. 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 Process for Service Partners

2.2.1. Service Partners are encouraged to use the RAST to communicate to advisors about the service offered and any changes.

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 partner portal under the documents tab. This describes how to update each section and how to use the RAST system. There is guidance on how to use the RAST, 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 duty 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 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 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 live immediately to be viewed by advisors.

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 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 days 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 cases when a major change involves changes needed to the case management system 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 is 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 consumer Operations Team or by contacting the operations 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 issues 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. Process for contact centres

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

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

2.5.3. Contact Centres should complete the" user request form” on the Consumer knowledge base. 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 Operations staff to the duty officer using the duty inbox or duty phone.

2. Process for Operations Staff

2.6.1. Operations staff will be given Admin access to the partner portal and RAST as agreed with their line manager.

2.6.2. Admin access to the RAST involves approving and rejecting RAST changes and creating new RAST protocols. This access also allows Operations staff to re-set passwords, set up users and lock user accounts.

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

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 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.

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The Citizens Advice consumer service provides free, confidential and impartial advice on consumer issues in England, Wales and Scotland.

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The Scottish Association of Citizens Advice Bureaux - Citizens Advice Scotland, Scottish charity number SCO16637