



## Peer Review Questionnaire

### 1. Contact details, remit and client journey

<b>Name of agency</b>	
<b>Please confirm Address of advice service</b>	
<b>Please confirm primary contact for peer review enquiries</b>	Name: Tel: Email:
<b>Please confirm second contact (in case of absence)</b>	Name: Tel: Email:
<b>Please provide additional staff members NAMES and EMAILS who require access to the Sharefile platform.</b>	
<b>Remit of advice service</b>  Describe the remit of the advice service in relation to the Types and topics of advice provided (e.g. Type II in Welfare Benefits) and including the sub-topics as defined in the SNSIAP (e.g. Means-Tested benefits).  (We will share this information with the peer reviewer.)	

**Description of client journey**

Describe the procedures followed by clients seeking advice.

(We will share this information with the peer reviewer.)

**How do clients get in contact with the agency e.g. by phone, email, visiting agency?**

**How do you deliver advice e.g. face to face, telephone, email?**

**Do you undertake cases from the following: Other Agencies?**

**Yes No**

*If Yes, please provide further information e.g. if you are doing third party referrals for advice*

**Other Projects?**

**Yes No**

*if Yes, please provide further information on the project and type of advice provided e.g. type II advice*

**How many specialist advisers does your agency have? (Please list specialists by topic)**

**Which area(s) of work are routinely referred on or signposted to other agencies e.g., court representation:**

- Attendance at ASBO hearings
- Benefit tribunals including appeals
- Court representation
- Housing tribunals

**Do advisers update cases on the case management system?**

**Yes No**

*If No, please provide information on who does this role e.g. administrative assistant*

	<p><b>Do you provide advice from outreach locations?</b></p> <p><b>Yes</b>                      <b>No</b></p> <p><i>If Yes, please provide details of any difficulties in using these locations e.g. unable to copy documentation from clients</i></p> <p><b>Please add any further information about the client journey you think would be helpful for the peer reviewer when reviewing your case-files:</b></p>
<p><b>Cases post Covid-19</b></p> <p>Please outline any (temporary or other) changes you have made to your advice delivery/client journey in response to Covid-19 that you believe are relevant to your peer review.</p>	
<p><b>Advicepro</b></p> <p>If you are an agency using Advicepro, please confirm you will have licences available for the required number of reviewers to access your system for up to 6 weeks.</p>	
<p><b>CASTLE</b></p> <p>If you are a CAB, please set out how you attach documents to CASTLE.</p>	

2. We estimate that the number of case files which evidence use of Type II and/or Type III\* competences (with the required consent or other legal basis for processing) that we have provided advice in over the last 12 months is;

- a. **Housing**
- b. **Welfare Benefits**
- c. **Money/Debt**

*\* Type I cases cannot be reviewed and will be rejected from the pool of cases.*

3. We have completed a Scottish National Standards for Information & Advice Providers self-assessment of our advice service.

**Yes**                      **No**

4a. Have you been routinely asking clients for consent to share their casefiles for the purposes of external quality assurance?\*

**Yes**                      **No**

***If no, please answer Q4b.***

4b. What is your legal basis for processing under the GDPR?

*\* You must not share any client casefiles with SLAB for the purposes of quality assurance unless your clients have given their consent to this or you have another legal basis for processing under the GDPR.*