



## AdvicePro Guidance - Peer Reviewer

### **Step 1 -Login**

Using the credentials supplied by AdvicePro support/Organisation

<https://www.advicepro.org.uk> (Username and Password)

### **Step 2 - Search for case file**

In top right-hand corner there is a quick search box. Enter the case/client reference in this box, taken from the list provided to you by the SNSIAP coordinator and then select go.

### **Step 3 - select case**

The client/case will then appear in search results and you will need to click the case reference number which is underlined.

This will then open up the 'Case Details' page for that client and that case.

The Matter Category (Topic Area) for this particular case is listed in the green bar, either Debt/Welfare Rights/Welfare Benefits/Housing.

The client may have various cases, both in terms of Welfare Rights issues/Benefits, Debt and or Housing. Each case will have a unique case number, but the client number will be the same for all cases.

### **Step 4 - Starting peer review**

At the top of this page there is a button entitled 'Case Review' click on this and you will be presented with a drop-down menu. Select the option entitled 'Start case review Mode'.

You will be presented with a 'Start Case Review note box' the date will be prepopulated but you will be asked to confirm the 'Review Type from the drop down menu you should select 'full review' and then in the note box you would type 'SNSIAP Peer Review' (at no other point during the review should you be entering notes on the case file) and then click 'start review'.

### **Step 5 - Peer review**

Work your way through the case file using the tabs\* and links contained in the file. These will vary depending on the Matter Category and agencies will customise AdvicePro to suit their needs and may use tabs differently to hold information.

### **Step 6 - Complete review**

When the peer review is complete select the 'Case review' button at the top of the page and from the drop-down menu select 'finalise review'

### **\*Tab summary**

#### **Client -**

Clients details including personal information i.e. address, demographics, partner details, contacts, dependants, social issues, client addresses, employment history and client cases (list of all other cases under this client).

#### **Case -**

Information relating to the work carried out on the case for which the secondary tabs are listed below.

#### **Details -**

Details of case owner, case status, external audit consent verification, advice categories, case summary pages, sub matters, funding sources and outreach locations

#### **Progress -**

A checklist for verifications to be checked by the adviser. Documents for each check, i.e. consent form, can be attached and held in the folders on the right of the screen. (Can also be renamed to Documentation or Checklist).

#### **Strategies -**

Details of the options available to the client and indicates whether a discussion about the option has taken place with the client. (Can also be renamed to Options).

#### **Outcomes -**

Details the financial and non-financial outcomes achieved for the client. (unless it is a welfare rights matter category in which case they are recorded under welfare rights stages for each case/issue)

#### **Scored outcomes**

May be used to record client journeys or survey results

#### **Financial Exclusions -**

Used in Debt cases to record any financial exclusions client is presenting with.

#### **Financial Capabilities -**

Used in Debt cases to record the client's financial capabilities before the advice given and then the after score to show the difference the organisation has made in terms of enhancing the client's financial capability.

#### **Social Policy issue -**

Allows for inclusion of any social policy issues involved in the matter.

#### **Referrals -**

Information on all the referrals made for the client. This will include where referral came from, as well as referrals made by the organisation elsewhere for this client and the reason for doing so.

#### **Work completed -**

List of work carried out on the particular case. This is generally where notes/work is added both as an individual work/note item and a work/note package.

It will show time spent on the item, by adviser, funder, location and work type.

#### **Letters -**

Any letter sent to the client for this case via AdvicePro standard letter templates will be held here.

#### **Diary -**

Key dates, tasks and appointments for case files.

If none are shown immediately select 'show completed key dates, task or appointments' and these will then appear.

#### **Welfare Rights Stages -**

This is where the benefit stages are held, from **Benefit check stage**, to proceeding to **Claim stage**, to **Mandatory Reconsideration or Review stage** to **Appeal stage**.

The adviser should record in here every stage and followed by result, whether the benefit claim is refused or successful.

This is also where the financial gain will be recorded for Welfare Rights cases. Each stage and gains are recorded per benefit, so there may be multiple cases opened for this client, one for every benefit claim made or assisted with.

#### **Financial Statement -**

This is visible in Debt cases to record the client's Income, Assets, Expenditure, Debts, Additional Information and Summary.

If the Agency is FCA regulated they will have entered their FCA license number which will enable the trigger figures as per the SFS (Standard Financial Statement) or CFS (Common Financial Statement/Tool)

#### **Universal Credit Stages -**

This allows the service to record any Universal Credit cases they record. This tab will be used instead of Welfare Rights stages as all the elements are recorded within the same case, ie. Standard Allowance, Child Element, Disabled Child element, Childcare costs, Housing Element, Limited Capability for Work element, LC for Work Related Activity and Carers element.

It will still follow the same pattern in regards to Income, Summary, Benefit check stage, Claim stage, MR/Review stage and appeal stage. It just maintains all the elements within the same case, rather than separate cases for each element like Welfare Rights. (Not all agencies may be using this Matter Category)

#### **Audit -**

Lists all reviews and audits carried out on case.

Also records the Audit trail of the case so far.

#### **Case notes -**

Holds all notes that have been entered anywhere on this case, including work completed items.

The option to view notes across all cases is also available here, which will allow you to view all the notes regardless of what case you are in for the client.

There are various filter options available also including show only notes with attachments, date selections, adviser selections, note types, contact types and containing text option also. This tab may also be renamed to Case summary.

#### **Custom Fields -**

There may also be additional custom fields, both on the client details page and the case details page. This is where the Agency has added some additional functionality to record/report on. Examples of these could be Rent arrears, Universal credit/APA information etc...

This is individual to each Agency and some do not use Custom fields at all.

**Once Peer Reviews have been completed, please notify the Organisation so that access can be removed and all cases transferred back to the advisers.**

#### **AdvicePro Guidance - Auditor**

- Step 1 - Login**  
Using the credentials supplied by AdvicePro support/Organisation
- Step 2 - Go to Agency Directory** at the top right-hand side of the screen.
- Step 3 - Select Library / Documents**
- Step 4 - Filter SNS documents under Category filter**
- Step 5 - Select each standard individually, by clicking on document.**
- Step 6 - Logout** once completed.