Claimant history

Contents

Introduction

Claimant history provides an overview of what actions have been taken on a case. This includes agent, claimant and system messages. It also captures outcomes of the actions taken.

Claimant history

Claimants cannot see Claimant history on their account. This information is only visible to staff. However, claimants can request information held in Claimant history so it is important not to include anything the claimant should not know or see. This includes details of any fraud referrals made.

Couple claims share one Claimant history. If one of the couple requests information in Claimant history, they will see anything recorded about their partner. A claimant's health information is classed as sensitive data, so must not be entered in Claimant history as this is not to be shared with partners.

Claimant history:

- gives a quick summary of what has happened on a case so it can be dealt with efficiently and accurately

- gives a clear audit trail of the action taken - for example, information about work or appointments, evidence for decisions and appeals

- prevents unnecessary referrals to other parts of the business

It is used to record actions that have been taken to update a claim.

Claimant history entries must:

- be clear, concise, free of jargon/text speak

- use recognised abbreviations only

- not contain defamatory information

- use opening words that make it easy to identify the topic it relates to, for example 'Sickness', 'Holiday' etc. (this will increase the speed in which agents can scroll through the list of conversations)

- meet the requirements of the General Data Protection Regulation

- give a quick summary of what has happened on the case so it can be dealt with quickly by others

It is recommended that conversations are 'FRANC'. While the acronym has been borrowed from the Disability Discrimination Act, the meaning in this context relates to:

- Factual (personal opinions must not be recorded)

- Relevant

- Accurate

- Not excessive (to the point)

- Current (not out of date)