

# Journal messaging: Guidance

## Contents

Introduction  
Claimant journal  
Journal messaging for claims by phone  
Journal messaging for couple claims  
Threats of suicide or self-harm  
Journal security  
Journal categories  
Journal standards  
Sharing links to websites  
Writing clear and simple journal messages  
Journal best practice  
Group journal messages  
Deleting journal entries  
Unsafe Interactions

## Introduction

Although the journal is a tool which belongs to the claimant, it is used by both claimants and agents to keep in touch with each other.

Its main function is to allow claimants to communicate with Universal Credit and to provide a chronological record of conversations and activities regarding their claim. This differs from 'Claimant history' which the claimant is not able to see in their account.

Claimants may find it difficult to read or understand journal messages and if they are unable to engage using the journal, the consequences may include:

- being unfairly sanctioned or receiving delayed or inaccurate payments
- underpayments for missing additional amounts which could result in rent arrears leading to possible homelessness

## Claimant journal

The purpose of the journal is to:

- encourage digital communication and prevent calls
- help staff to progress a case
- maintain a relationship with claimants if they don't see a work coach regularly
- find out what the claimant needs to do to prevent duplication or follow-up with a colleague
- respond to claimant questions and give updates

- get more information from the claimant (for example, further evidence)
- remind claimants when an action needs to be taken

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

- **F**actual (personal opinions must not be recorded)
- **R**elevant
- **A**ccurate
- **N**ot excessive (to the point)
- **C**urrent (not out of date)

Therefore, journal entries must:

- be clear, concise and free of departmental jargon or text speak
- be tailored for each claimant and in the case of a couple claim, the claimant's name must be included in the entry
- meet the requirements of the General Data Protection Regulation and DWP data standards
- not include telephone numbers for individual staff (if the claimant needs to call, the correct phone number must be provided)
- only link to websites that are suitable for the claimant (see Sharing links to websites)
- not include agent notes

**Important note:** documents must not be uploaded to the journal unless the Universal Credit Service provides specific instructions to do so.

The claimant can write messages in their journal 24 hours a day, 7 days a week. However, they must be made aware that they will not receive a response to their messages outside office hours.

The agent's full name is shown on the agent side when they make a journal entry, but only their first name is displayed on the claimant side.

The claimant is automatically notified when they get a new journal message, using their preferred method of contact.

When several messages are being sent at the same time, such as multiple job or training offers or during a live chat in the claimant's journal, there is an option to stop the claimant from receiving a notification for each one.

## Journal messaging for claims by phone

Claimants who have a claim by phone are not able to access their Universal Credit account online. Therefore, all notifications added to their journal must also be posted to the claimant.

The reasons for a claim being made by phone is recorded in 'Claimant history.'

## Journal messaging for couple claims

Anything written in the journal of a couple claim will be visible to both the claimant and their partner. Therefore, any information which may be classed as sensitive must not be disclosed as this is not to be shared with partners, for example:

- details concerning the claimant's health
- information or support offered for domestic abuse situations

## Threats of suicide or self-harm

Incidents where claimants make threats of suicide or self-harm must be recorded in 'Claimant history' and not in the journal.

Any messages that raise concerns about a claimant's wellbeing should automatically flag as urgent but if this hasn't happened, the user must highlight that the claimant or others could be at risk.

For more information, see Suicide or self-harm: Universal Credit Six Point Plan.

## Journal security

To protect staff and DWP from harm, embarrassment or criticism the following must not be entered in the journal:

- personal information including surname, address, phone number, **National Insurance number** and email address
- bank account details
- personal or political opinions
- content relating to family members, private life, or personal opinions
- personal information of colleagues or other claimants
- uploaded images

## Journal Categories

When writing a journal message, the claimant will be required to select a particular category before sending and their choice of category will determine where the message is directed.

If an agent receives a message or to-do and they are unable to take the relevant action, this must be re-directed by changing the category.

Categories to be re-directed to a case manager are:

- Payments
- Service issues

Categories to be re-directed to a work coach are:

- Appointments
- Add a work search note
- Message my work coach

## Journal standards

The journal is the main method for staying in contact with a claimant and the quality of journal entries can help to create and maintain a good relationship. However, feedback from agents has shown that claimants sometimes find it difficult to read or understand journal messages.

Poor quality journal messaging may lead to confusion and can result in an increase in unnecessary messages and inbound telephony. Agents should consider the following:

- offer the appropriate professional greeting
- write entries in a polite, friendly, open and honest way
- the claimant's individual circumstances and any potential cause for offence (think about which benefits the claimant is receiving and the range of situations that are implied)
- tailor the approach to suit the claimant's needs (check for understanding and reword if necessary)
- accessibility needs and the use reasonable adjustments where appropriate
- read the message you have written from the claimant's perspective:
  - do you understand what you have written?
  - would you be happy to receive the message you have written?

- manage claimant expectations (for example, give clear deadlines)
- be clear about what the claimant could gain or lose if they take the required action (or don't take the required action)
- give reasons when asking the claimant to provide information or to take action
- explain delays and give apologies when necessary
- use the spellcheck tool in the Service and be mindful of punctuation as this can change the context of what has been written
- update 'Claimant profile,' 'Claimant history' and the 'Support needs' page clearly and accurately

## **Sharing links to websites**

It may be helpful to share websites with claimants to help them to complete an action, but agents must include enough information in the message to explain why this would be useful to them.

Website links can be shared with the claimant to help them complete a mandatory activity (for example, to create or update a CV) but they must not be mandated to use specific websites. Links may be shared if:

- a check has been made to confirm that the link works
- claimants do not have to pay to access the information they are being referred to
- it is not an App or a Social Media site (apart from government accounts, for example DWP or YouTube)

If the claimant indicates a preference for the Welsh language, send links to websites in Welsh if possible.

If a claimant raises concerns about website cookies and does not want to allow cookies on their device, agents can recommend the use of the Department's devices available in jobcentres.

## **Writing clear and simple journal messages**

### **Composition**

When writing journal messages, consider the following steps in order to make the information easier to read and understand:

- use plain English because this is clearer, simpler and people prefer it
- write less, say more and keep content short, clear and simple
- follow a logical layout with important information presented first
- align text to the left and keep a consistent layout
- use headings, sub-headings and line breaks to break up long text
- use a new line where a long word goes over line size

- highlight important points in **bold type** (do not underline words, use italics or write in capitals)

To make it easier for claimants to understand what is being communicated:

- do not use acronyms
- do not use 'emoticons' (combinations of letters which represent emotions) for example:
  - :-) happy
  - :-( sad

Do not use the typical shortcuts of text messaging. Some people may understand what 'can't w8 2 cu' means, but others will not.

Give consideration to the structure and language used when writing journal messages, particularly when instructing a claimant to take action to progress their claim.

## Structure

Break the contents up logically, for example:

- greeting
- purpose of the journal entry (I need xxx from you)
- action needed from the claimant (you need to do xxx)
- timing
- consequences of the claimant not taking the action

## Language

Write sentences in the active voice as these are easier to understand than those written in the passive voice. The active voice clearly identifies the action to be taken and who is performing that action.

Example of the passive voice:

- by Friday your evidence should be provided

Example of the active voice:

- you must provide your evidence by Friday

To make sure people understand and engage with messages, there are 4 communication principles:

- be clear
- be helpful
- be respectful
- be positive

For more information, see Written standards.

## **Journal best practice**

Use asterisks to emphasise words, for example **\*\*XXX\*\***

For points and lists, use a dash followed by a space:

- this is a point
- this is another point

If possible, use shorter words and sentences to keep it clear and simple.

Long or complex words can often be replaced by a single and sometimes shorter word which means exactly the same thing. This is easier for the claimant to read and understand.

Choose words carefully. Use words and phrases you would use if talking to the claimant.

Try to mention just one idea or action in each sentence. Too much information in one sentence can be confusing or overwhelming, for example:

- do not use 'this training will improve your chances of finding work and give you new skills to help you earn more'
- use 'this training will improve your chances of finding work. It will also give you new skills to help you earn more'

Concentrate on the action. Use clear and direct verbs rather than phrases with a long string of nouns, for example:

- do not use 'if you demonstrate compliance, we will...'
- use 'if you do everything needed, we will...'

Be consistent. Don't use several terms for the same thing, for example:

- do not use 'your coach', 'your adviser', 'your contact' interchangeably
- use 'your work coach'

Be friendly rather than unnecessarily formal as this appears distant and out of touch.

Do not use abbreviations or acronyms.

## **Group journal messages**

Group journal messaging can be used to alert multiple claimants to job opportunities, job fairs or skills/training courses that may be suitable for more than one claimant.

Agents will decide how many and which particular claimants on their caseload will be included in the group message. To ensure that group messages are only sent to suitable claimants, agents must gather information using the available filter options.

Consider carefully the audience when writing group journal messages. The message may not be appropriate for everyone in the group, for example do not:

- have journal conversations about going on holiday, leaving the department or moving on due to promotion
- wish persons in your caseload good luck, or all the best in their future job search as you could be sending it to a claimant who is terminally ill or bereaved

Do not upload documents onto group messages or include links to external sites, although signposting is allowed.

## **Deleting journal messages**

There is a risk that deleting journal messages which contain attachments could destroy necessary audit trails in the event that the Department is ever legally challenged.

The agent delete function appears against individual journal messages.

Messages can only be deleted by staff within 30 days of them being created. Therefore, it is essential to check that messages (especially those with attachments) are correct at the time they are created. If errors are identified, the message must be deleted at once and replaced with the correct information.

Claimants are often confused when messages they have previously seen suddenly disappear without any explanation. Therefore, if messages are deleted, remember to add a brief explanation so the claimant is aware of what has happened.

## **Circumstances when journal messages can be deleted**

Journal messages can only be deleted if they fall within the following criteria:

- addressed to the wrong claimant
- personal information has been added
- spelling mistakes



- incorrect dates
- due to assurance activity
- incorrect letter uploaded

## **Deleting claimant journal messages**

There is no function on the Service for agents to remove or delete a claimant's journal messages.

Journal messages from claimants containing sensitive or personal information (for example, bank account details or National Insurance numbers) cannot be deleted by agents and a request for this must be sent to the Service Innovation Lead (SIL).

Incidents of abusive or threatening messages in the journal must be reported on the 'Keep Customer Interactions Safe (KCIS)' service.

Agent Support cannot delete any of these types of messages until all safety investigations have been completed and/or the Safety Interactions Risk Manager (SIRM) asks Agent Support to do so.

Agents must not take any further action unless this process has been followed. If in any doubt, contact SIRM for advice.

If journal entries are deleted and not replaced, a note for the claimant explaining the deletion could avoid confusion.

## **Unsafe interactions**

An unsafe interaction is any incident that causes, or has the potential to cause agents to feel:

- upset
- threatened
- frightened
- physically at risk

Agents must report these incidents through Keep Customer Interactions Safe (KCIS) and the Safe interventions Risk Manager (SIRM) will determine a suitable response or warning, writing to the claimant if necessary.

If there are questions asked by claimants in abusive journal messages, these must be answered by the work coach or the case manager. The SIRM does not address these questions in their response to the claimant.

Staff must not respond to abusive comments in journal messages and will need to be aware of the type of message that is appropriate.

For more information, see Keep Customer Interactions Safe: Guidance.