

Online Centre Delivery Guide

1st July 2019 - 31st July 2020



HM Courts and Tribunals Service: Assisted Digital Support

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This delivery guide is for Online Centres taking part in the HM Courts and Tribunals Service (HMCTS) face-to-face Assisted Digital pilot.

It covers:

- What Assisted Digital support is and how it applies in this project
- What we want to learn from this project
- Who you will support and how you will support them
- How you should record what you're learning through the pilot
- Service level agreements and expectations

For clarity, we refer to people who need and use HMCTS as 'customers' in this guide.

1. Support

Useful numbers

Contact HMCTS

For questions relating to the HMCTS customers and online forms, you can contact the dedicated HMCTS helpline number: 0300 303 0646. You will be asked to enter a pin which is 2233. The helpline is available Monday to Friday, 9am to 5pm.

Please note this number should not be shared with any user and is internal only. If the user wants to speak to HMCTS then the Online Centre must dial, enter the pin and pass the phone over to the customer.

Contact Good Things Foundation

For general questions about project delivery or feedback, contact:

General funding inbox on grants@goodthingsfoundation.org

Supporting Documents

Training webinars are available on the [HMCTS Landing Page](#). Here you will find the latest version of this delivery guide, supporting documents and a webinar for each live HMCTS service.

Webinars include:

- Introduction to Assisted Digital
- Introduction to the services, e.g. ESA, Divorce, PIP, Help With Fees
- And more

We require all centre staff and volunteers to watch all webinar recordings before offering Assisted Digital support to customers and to comply with the updated Service Standards provided at the end of this document.

2. Introduction to the HMCTS Project

About HMCTS

HM Courts and Tribunal Service (HMCTS) is an agency of The Ministry of Justice (MOJ). The Government is investing £1 billion to reform and modernise the UK's justice system and make justice services more efficient and accessible to everyone.

About the project

HMCTS knows that not everyone has the skills, abilities or access to use the new online services on their own and want to provide 'Assisted Digital' support for them. To do this, Good Things Foundation will work with Online Centres to identify and support those who need Assisted Digital support with services, and HMCTS will offer telephone support through their Customer Telephone Service Centres (CTSC), referring customers to centres where applicable.

This project is a great opportunity both to support the transformation of the UK's justice system, and to help the Government learn about how to deliver assisted digital and design a service in communities that works for the people who need it.

The start and end dates of Phase 3 of the project are: **1 July 19 - 31 July 20**

- **Wave 1 of centres delivering** - 1 July 2019 to 31 July 2020
- **Wave 2 of centres delivering** - 1 December 2019 - 31 July 2020

What we want to learn and how

Good Things Foundation and HMCTS are evaluating this project in detail to understand what works and what doesn't work. Ultimately, we want to know how face-to-face Assisted Digital support can help HMCTS customers, which customers and why.

Following the end of the pilot in June 2019, together with HMCTS, we evaluated the first two phases of the pilot, making clear recommendations on how face-to-face Assisted Digital support could be delivered as a mainstream service. As we now move into Phase 3, we aim to scale the service being offered and trial delivery in a wider range of centres. Through this last phase of delivery, we will continue to evaluate and test the Assisted Digital service, its impact and cost effectiveness, enabling HMCTS to make decisions about further delivery and scaling within the courts and tribunals model of the future.

Your expertise and insight is vital to this learning and we want to work closely with you every step of the way! We aim to answer these questions through:

- The data you input into CaptureIT eg. appointment times, outcomes, customer feedback.
- Telephone calls with the Good Things Foundation Network Team, where you can share what is and isn't working.
- Telephone calls and interviews between you and the Good Things Foundation Team and HMCTS researchers.
- Telephone calls and interviews between your customers and the Good Things Foundation Team and HMCTS researchers. For this it is vital that you complete a customer consent form. More detail about consent is provided later in this guide.
- Inviting you and HMCTS customers to design and test new models and ideas with us.

What is Assisted Digital support?

Assisted Digital support is help for people who need to use online services but don't have the skills, ability or access to do so on their own.

During this project, Online Centres will help people complete online forms for the following HMCTS services:

- Civil Money Claims
- Divorce
- Probate
- Single Justice System eg. TfL fines
- Social Security and Child Support e.g. PIP, ESA appeals and Universal Credit appeals
- Help with Fees (an additional form that customers can complete if they are on low income/welfare benefits that may waive or reduce their court fee)

Your job will be to guide customers through these forms and help them understand the online guidance, aiming to complete the online form.

Support will look slightly different for each customer and you can tailor the session to meet their needs. For example, some customers will want you to sit with them throughout to explain each step of the form, while other customers may be more independent and just need to call on you when they are stuck.

You can deliver Assisted Digital support through a pre-booked appointment or 'there and then' support through a drop-in/walk-in appointment. Some customers will be able to complete in one go whilst others might need more appointments. We want to give you the freedom to deliver support in the best way for your centre and the customer as long as you provide a consistent service in line with the Service Standards.

It's also worth noting that any digital skills training is not funded by HMCTS, so any training you may offer to customers will need to happen outside of the form filling.

Assisted Digital support is not legal advice. HMCTS are able to offer procedural guidance on their services, however they are not permitted or trained to give any legal advice. This is to ensure HMCTS remains unbiased in the facilitation of the court service. This applies to HMCTS funded projects too, so it is critically important that you abide by the same rule in the delivery of this pilot if you are not qualified to give legal advice. We understand that the boundaries between legal advice and assistance are sometimes blurred. Here are some definitions that may help:

Assisted Digital

Assisted Digital support is help for people who need to use online services but don't have the skills, ability or access to do so on their own. This could be face-to-face, on the phone or through webchat. Face-to-face Assisted Digital is to provide access to a digital device, help people understand online guidance provided, help people navigate the online form and get to the point of completion. The online guidance provided may be legal information.

Legal advice

Legal advice is providing your opinion to an individual about how they should deal with a specific legal matter. Legal advice consists of much more than just representing somebody in court. For example, filling out legal documents for another person, giving advice on what they should write in legal forms, and speculating about the outcome of a case all count as providing legal advice. Because these situations all affect the legal rights of individuals, it is illegal for anybody who is not licensed to practice law to provide legal advice. If you are qualified to give legal advice you may offer this to your customers but if you are not please refer to an organisation or representative who can.

Based on these definitions of Assisted Digital support and legal advice, here is some guidance on what support you can offer **during Assisted Digital appointments:**

You can:

- Read out and paraphrase the information on the screen to help customers understand the form.
- Point out important facts on the screen customers may overlook.
- Explain the process, timescales and what happens next.
- Help them with their spelling and/or grammar if they ask this of you.
- Type on behalf of customers if they are unable to do so for themselves. If you do this, the customer will have to sign a Typing Authorisation Form to state they have asked you to type on their behalf and confirm that they are happy that what you typed accurately represents what they have said. You will need to keep a copy of this form along with the customer consent form for your records. You should store these forms securely at the centre and retain this until 6 months after the project ends.
- You can find the form on the [Online Centres project landing page](#).
- Listen and reassure where you feel able to.
- Ask them if they've had any advice and help them find out where they can go.

If customers need legal advice

- If your customer needs legal advice and you **do not offer** this at your centre, signpost them to where they could go and recommend they get advice before the appointment with you.
- If your centre **does offer legal or certified advice** in areas that are relevant to HMCTS (eg. family law or welfare/benefits) you can offer to the customer at the time of the appointment.

Providing feedback

We're aware that many HMCTS customers will need both assistance and legal advice when

filling out online forms. We are hoping to mitigate this through early signposting for the customer to receive legal advice as set out above - but we want to make sure we have continuous feedback on how this is going from your perspective and how it affects the assisted digital support you are offering.

Please let us know if the distinction between assistance and legal advice is causing problems, or if you have best practice about how to manage it better. Ultimately, we want to be able to improve the experience for HMCTS customers and better support you to support them.

Who will you support?

At this stage, support is open to anyone who doesn't have the skills, capability or access to use HMCTS online services themselves.

Customers eligible for assistance are:

- People who do not have the digital skills or confidence to complete online forms themselves e.g. can't navigate websites, use keyboards or upload documents
- People who do not have the capability to complete online forms themselves e.g. physical or mental health problems, learning difficulties or language barriers
- People who do not have access to a suitable digital device or internet connection

You will engage customers in two ways:

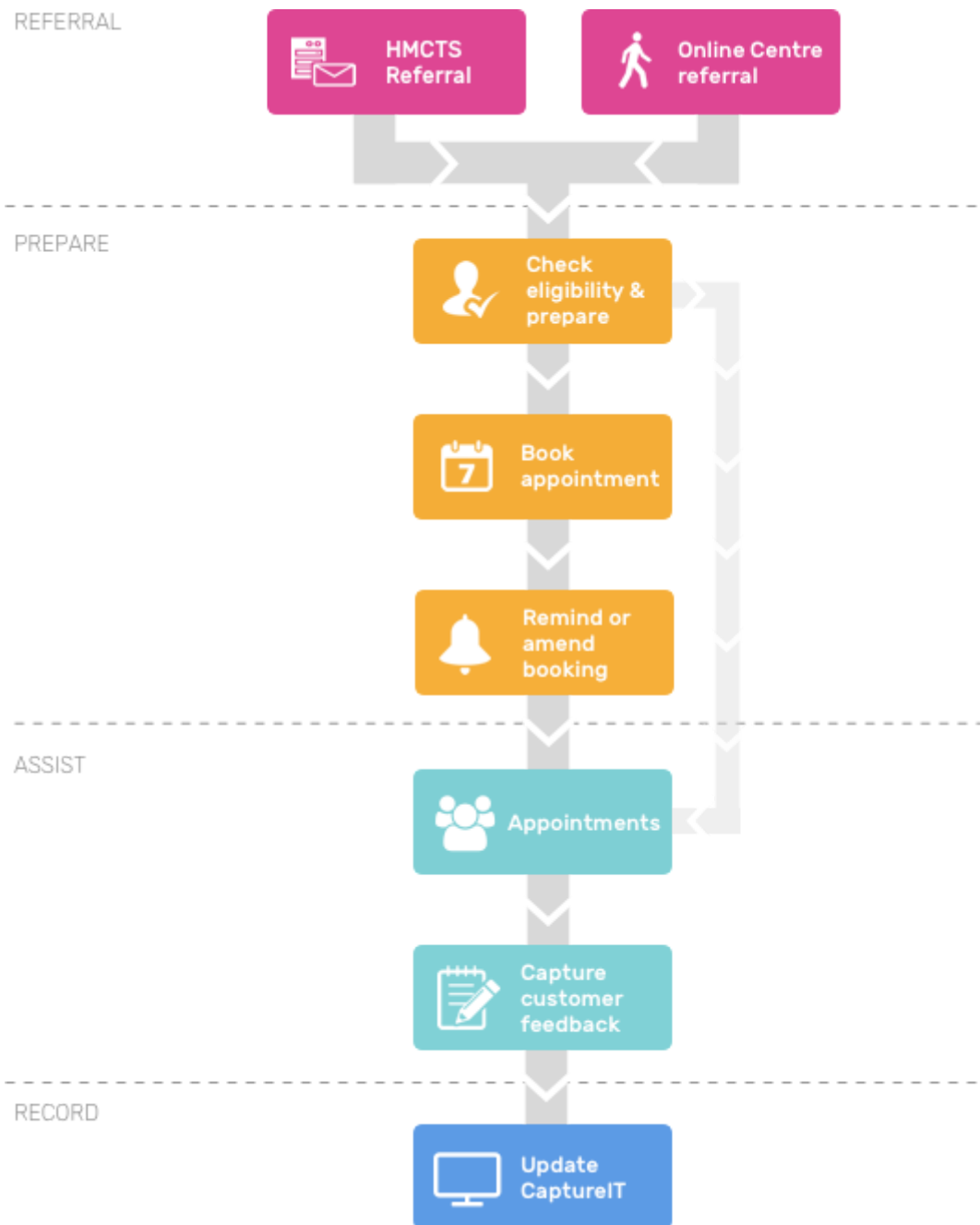
- Online Centres - staff will engage and identify people needing face-to-face support through their centre and networks - this may be referred to as 'walk-ins'. This is where we expect the majority of your customers will come from.
- HMCTS Customer Service Telephone Centre (CTSC) - Callers will be identified for face-to-face support and referred to the closest online centre to them. Good Things Foundation will email this referral over to you, and you must action this within 10 days unless noted otherwise.

More detail about both of these engagement methods is provided in Section 6.

HMCTS are still offering paper based forms, so people aren't forced to use online forms - it's their choice. Paper forms can be found online. It's important to note that HMCTS are not funding any assistance with paper forms.

We would like to learn more about the different types of people that need Assisted Digital support, to ensure we reach them and respond to their needs as well as we can. So we will be asking for your feedback on who the support is helping, how and why.

3. Customer journey



4. Appointments

Booking new appointments

Recruitment through Online Centres (e.g through your partners, or through walk-ins)

1. As part of this project you should identify people that need help with HMCTS online forms through your centre and/or your networks. We have provided promotional posters and leaflets - see [HMCTS Landing Page](#) for the available material (Downloadable posters section). You can also create your own posters if these are not suitable.
2. Using the guide in [section 5 “who will you support?”](#), you can determine whether people are eligible for face to face support.
 - a. If you're unsure of the customer's eligibility or the forms they need to complete, you can pass on the relevant CTSC number (in the [Useful Numbers](#) section) to the customer, so they can call directly to discuss their situation and requirements.
 - b. If you believe they are able to do the form themselves with telephone support, we recommend you signposting to the relevant CTSC for troubleshooting.
 - c. If they wish to complete the forms by paper instead, you may wish to find and print the forms for them using the [online form finder](#).
3. It's essential that you use the appointment checklist and the Required Documents list when you call to ensure that the customer is fully prepared for the appointment e.g. if they have the necessary information, advice, documentation and funds to complete the online form. You should also determine what needs and preferences they have so you can prepare accordingly.
4. If the customer is fully prepared, and you have the capacity, you may wish to start your appointment immediately. Alternatively, you will need to arrange to see the customer within 10 working days
5. If you're unsure of the customer's eligibility or are unsure about the forms they need to complete, you can always contact the relevant CTSC number (see our [Useful Numbers](#) section for the telephone numbers for each service) or pass the number on to the customer, so they can call directly to discuss their situation and requirements.

6. You will then need to update CaptureIT immediately after the call and log when the appointment will be happening.

Referrals from HMCTS

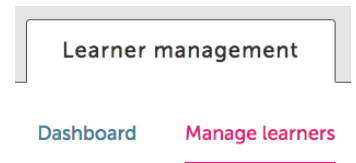
1. Assisted Digital support will be promoted by CTSC, and callers who require face-to-face Assisted Digital support will be identified. The CTSC will complete a referral form, email it to Good Things Foundation who will then email the referral on to you.
2. When you receive the referral and password, you will then need to call the customer to arrange when to come in for assistance. You need to assist customers within 10 days, or 3 days if it is an urgent or time-sensitive matter.
3. It's essential that you use the appointment checklist and the Required Documents list when you call to ensure that the customer is fully prepared for the appointment e.g. if they have the necessary information, advice, documentation and funds to complete the online form. You should also determine what needs and preferences they have so you can prepare accordingly.
4. You will then need to update CaptureIT immediately after the call and log when the appointment will be happening.
5. If a customer wishes to cancel or rearrange an appointment, they need to contact you directly. If a customer doesn't turn up to their appointment, please call them to understand why and find out if they would like to rebook. Please update CaptureIT with the new booking and/or reason why. It's vital we learn why people don't want to attend the appointments and how we can make the service more accessible. We also want to understand the true time and cost involved with booking appointments.

Using CaptureIT to add new appointments

Once you have confirmed your appointment with the customer, it is important that you log this onto the CaptureIT system as soon as possible. The tool used is called CaptureIT, and is accessed through the Learner Management tool in Learn My Way.

Accessing CaptureIT

To be able to complete the appointment through CaptureIT, you must be registered as a tutor on Learn My Way. Please let the Grants Team know if you don't have access.



Log in to [Learn My Way](#), and click through to the Learner Management Section. From here you can either select a customer from the list if they already exist on Learn My Way, or create a new record for them. For this project it is likely you will be creating a new record.

Adding customers to the CaptureIT system

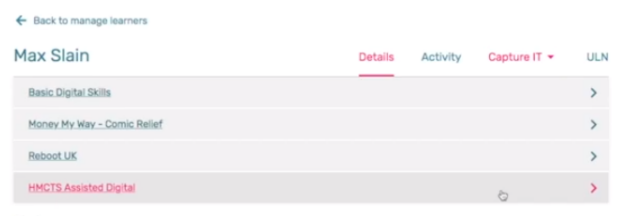
To register a new customer you should select 'create new learner record'.

The site will prompt you to enter basic details about the customer: their full name, and one piece of contact details, e.g. email address, phone number or postal address. You only need to enter one piece of contact information to register the customer. You must make sure that you get permission from the customer to record their details. We (Good Things Foundation) will not use any of these details to contact them unless we are required to for audit purposes..

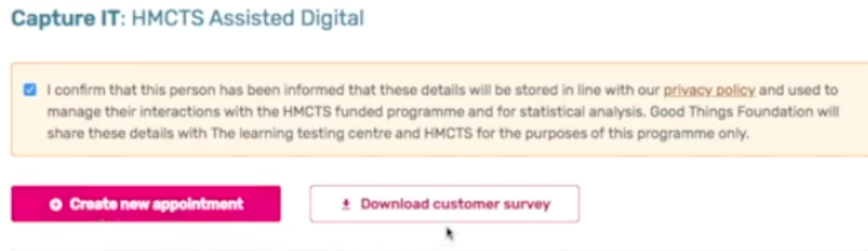


Adding an upcoming appointment

To add a new appointment, you should go back to the Learner Management tab. From here you can select a customer name from the list, or search for them on the right hand side search box. You can then click on their name which will open up their Learner Record. On the top right of their record you can hover over CaptureIT and select HMCTS Assisted Digital from the grey drop down that appears.



You will now see the option to add a new appointment.



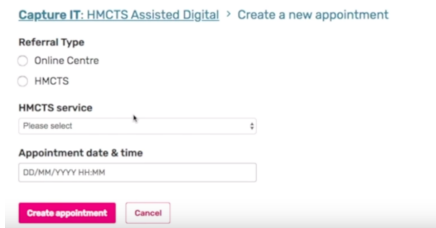
Select **Create a new appointment**. You now have a few options for this form.

Referral Type: HMCTS email referral*, Referral from another organisation, or Self referral, HMCTS court referral.

**Any referrals sent from Good Things Foundation are HMCTS email referrals.*

HMCTS Service: e.g. Civil Money Claims, Divorce, Probate

Appointment Date and Time: As per your booking



If it is a HMCTS referral you will also have to enter the AD Reference Number which is provided on the referral documents. If you can't find this please let the grants team know as soon as possible.

When all the information is entered, press the Create appointment button.

Your appointment will now show on the bottom of the screen.



After the appointment

Customer Feedback, Consent Forms and Typing Authorisation

When every customer has finished their appointment, please ask them to complete a paper copy of the customer feedback and consent form. You can find a copy of the form on both CaptureIT and on the [Landing Page](#). Unless the customer requests your help, we recommend stepping away whilst they complete the form to offer them the privacy they need to provide feedback that is as honest as possible.

Please ask every customer to complete the consent section. If the customer has filled in the consent and you have updated the CaptureIT tool, we will be able to share their details with Good Things Foundation and HMCTS researchers and enable this vital research to take place.

Remember, if you have typed on behalf of the customer then you should also complete a Typing Authorisation Form. A copy of this is found on the [Landing Page](#).

We do not need you to send a scanned copy of Consent, Feedback or the Typing Authorisation form to us. You should store the paper forms securely at the centre and retain this until 6 months after the project ends.

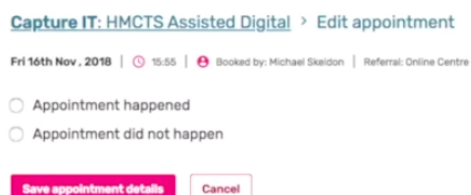
Updating CaptureIT after the appointment

Once you have completed the appointment, you must record the outcome on CaptureIT. If you have multiple appointments, please log them separately.

Updating CaptureIT record after the appointment

Now your appointment is created you will be able to go back in to update it, following further interaction with your customer. To get back to the appointment, revisit the Learner Management pages, select the customer name and move through the CaptureIT menu to HMCTS Assisted Digital from the grey drop down that appears.

You will see the appointment at the bottom of this page. Select the date to open the record. From here you can select whether the appointment took place, and add notes about the activity.



Capture IT: HMCTS Assisted Digital > Edit appointment

Fri 16th Nov, 2018 | 15:55 | Booked by: Michael Skeldon | Referral: Online Centre

Appointment happened

Appointment did not happen

Save appointment details Cancel

If you select Appointment Happened the system will generate a few additional options to fill

out, such as length of appointment, the outcome, and other information about the appointment. This also includes questions about the feedback and consent form (see Section 10).

If you select Appointment did not happen you will get 2 additional sections to complete; *Why not?* And *Additional information*.

You must complete either Appointment Happened or Appointment did not happen for each appointment booked.

Consent - updating CaptureIT

Section updated 31 March 2020

Please ask every customer if they would consent to a follow up interview. Interviews consist of up to 30 minutes of conversation with a researcher around their experience of the support they have received. The interview can be carried out over the phone or in person and is completely confidential and anonymous.

We are working closely with HMCTS to improve the services on offer and can only do this by capturing information from people using the service.

How to record consent

Step 1 - Once the customer has attended their appointment, you will ask them to complete a printed copy of the feedback and consent form as before. This is still linked on the [project landing page](#) on the Online Centres Network website and is also available through the CaptureIT tool.

Step 2 - Following completion of the paper form with the client, you will then log on to CaptureIT as normal, and complete the Appointment Happened section as outlined in the last section of this handbook. At the end of this section you will see the new Consent tick boxes for Interviewing, and Recording. **To note:** If the customer does not give their consent to be contacted for feedback and selects 'no' on the first question - the other boxes will not appear.

The screenshot shows a digital consent form with the following elements:

- Header text: "We are trying to improve the service and your views are really important to us. Would you be happy for us to contact you for more feedback?"
- Radio button options: "Yes" (selected) and "No".
- Section: "Consent 1 (to interview)" with radio button options: "Yes" (selected) and "No".
- Section: "Consent 2 (to be recorded)" with radio button options: "Yes" (selected) and "No".
- Section: "Contact telephone" with a text input field containing "e.g. 07711107711".
- Buttons: "Save appointment details" (pink) and "Cancel" (white with pink border).

Please complete these to reflect the answers given by the customer at their appointment.

Once this is done please click save.

If the customer has filled in the consent and you have updated the CaptureIT tool, we will be able to share their details with our researchers and enable this vital research to take place.

We do not need you to send a scanned copy of the content form to us. You should store the paper consent form securely at the centre and retain this until 6 months after the project ends.

5. CaptureIT FAQ

What if a customer doesn't attend but we book a second appointment with them?

For each appointment that you book you should add a new appointment record to the system and ensure you update whether they attend or do not attend (and why). This means that we can see how many times the individual has attended the sessions, and also see reasons why they may not have attended.

Why is it important to update CaptureIT?

CaptureIT is a key learning tool for the pilot project, and will also trigger the monthly grant payments to Online Centres.

Good Things Foundation will use CaptureIT to:

- Have an overview of appointments taking place
- Understand appointment outcomes.
- Understand customer feedback.
- Generate payments to Online Centres.

CaptureIT must be updated within 24 hours of completing an appointment. The Good Things Foundation Network Team will be monitoring this regularly, to ensure accurate information has been entered and that we are able to maintain an efficient service. We have to report back to HMCTS on a weekly basis and without timely completion of a Capture IT record from all Online Centres we aren't able to do that.

Apart from evidencing the support you have given in order for us to process payments, Capture IT will help us learn things like how long appointments really take, why people cancel appointments and what outcomes can be reasonably achieved.

If you have any questions about what you should be logging on CaptureIT please contact the Grants Team on 0114 349 1629.

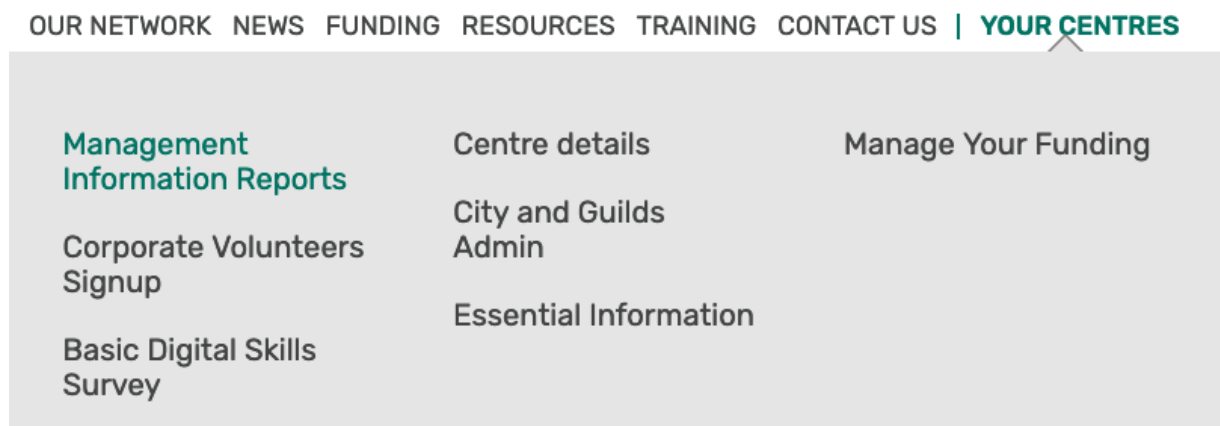
6. Management Information

Section updated February 2020

Management Information (MI for short) is a key tool for you to use throughout the contract period which will enable you to view monthly and yearly targets across your centres delivering the HMCTS project.

Accessing the MI

To access the MI, [log into your Online Centres Network account](#), hover over the Your Centres tab and from the drop down menu select Management Information Reports



Once the MI has loaded you will see 3 tabs called Summary, Learning and Performance, click on the **Performance** tab.

The image shows the MI interface with three tabs: Summary, Learning, and Performance. The 'Performance' tab is selected and highlighted in purple. Below the tabs, there are search filters: 'Centres to search on' (a dropdown menu with 'None selected'), 'Start month' (a date picker showing 'December 2019'), 'End month' (a date picker showing 'December 2019'), and 'Username or ID' (a text input field). There is also a checkbox labeled 'Group all chosen centres together (23)' which is currently unchecked.

The MI should default to your centre. If not, select the centre from the drop down on the left hand side called 'Centres to search on'.

Then select the timeframe you wish to view using 'Start month' and 'End month' (project delivery for this project is between 1st July 2019 - 31st July 2020 for **Wave 1**, and 1st December 2019 - 31st July 2020 for **Wave 2**).

Each time you log into your account and go onto the MI you will need to set the start and end months, it will automatically set to the current month we are in

Targets

There is 1 primary target for the HMCTS contract: **Completed and Submitted forms**. The MI shows a number of outputs which are relevant for your project:

- Target completions
- Completed Forms
- Partially completed forms
- Attended Appointments
- Scheduled Appointments

HMCTS						
Centre ID	Centre Name	Target completions	Completed forms	Partially completed forms	Attended appointments	Scheduled appointments
0000000	0000000	36	0	0	6	9

Target completions = the target is what you are working towards across the entirety of the contract, if you adjust the start and end months on the MI these figures will also adjust accordingly and be split across the timeframe months of the project.

Due to the sensitive nature of the subject matter for this project we have disabled the 'click through' option to view the names of the customers in each section. If you require confirmation of the status of any specific appointments please get in touch with the Good Things team with the customer details and we will confirm for you.

Useful to know

- ❖ We know that the status of appointments will change over time as customers return and complete forms or advise they will not attend. Please don't worry if your figures change month on month. This is normal as the appointment outcomes are updated.
- ❖ We will try to remove any duplicates or incorrect records as soon as possible so if the figures change slightly please don't worry. We will usually confirm any duplicates with you before we remove them, unless you have flagged this already to us. Entries flagged as possible duplicates will not show in your totals.
- ❖ All data is updated overnight from Learn My Way so if you enter data on Thursday before midnight, this will show the following morning on Friday.
- ❖ Excel/CSV file downloads are available for your MI data

7. Your outputs

Contract sizes are calculated as below:

Contract Requirements	£1,750	£3,500	£7,000
Number of individuals supported to complete an online form with Assisted Digital support for HMCTS online services.	25	50	100
Objectives			
Support individuals to complete online transactions (Assisted Digital)			
Help individuals to progress to independent usage of these online services			
Research uplift (additional £175 released in July): Participate in research as identified in the list below			
<ul style="list-style-type: none">• Provide 1 x case study (by 30 April 2020)• Take part in 1 x centre interview• Take part in 2 x user interviews			

Appointment clarification

For the purposes of this project, a completion is when the customer has attended their appointment and completed their form online. Appointments must only be booked and added to the system when the customer is ready to complete their form online.

Your project outputs will be tracked using the CaptureIT system, where you will log all appointments and their outcomes. This includes scheduled, attended and unattended appointments. You must complete these records on a weekly basis at a minimum. Ideally CaptureIT records should be updated within 24 hours of activity taking place.

Follow-on activities

As well as the Assisted Digital support, Online Centres will also where possible provide support to individuals to develop their digital skills so that they become confident, safe, capable and independent users of the internet. This will be part of the wider support that centres offer.

The contract sizes for **Wave 1** of Phase 3 are paid through 4 phased payments across the project year:

- 25% in July 2019 - initial payment
- 25% in November 2019 - must be at 25% of overall target
- 25% in March 2020 - must be at 50% of overall target
- 25% in August 2020 - must be at 100% of overall target

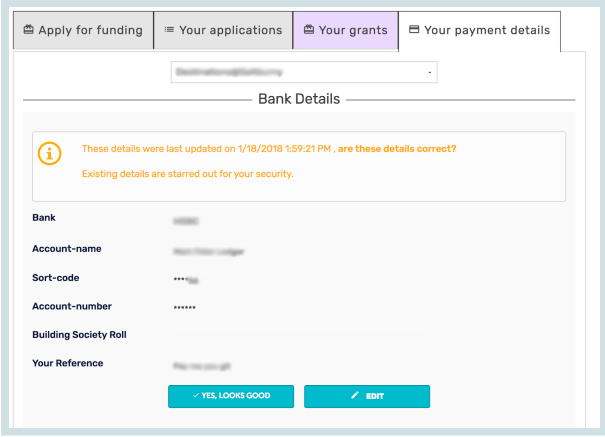
The contract sizes for **Wave 2** of Phase 3 are paid through 4 phased payments across the project year:

- 25% in December 2019 - initial payment
- 25% in February 2020 - must be at 25% of overall target
- 25% in April 2020 - must be at 50% of overall target
- 25% in August 2020 - must be at 100% of overall target

Updating Your Bank Details

If your organisation updates their bank details throughout the year, you should load up the [Manage Your Funding page](#) on Online Centres, and click through to Your Payment Details.

Select your organisation from the drop down menu and load up the Bank Details. Existing details are starred out for your security. If everything is in order, you can confirm these are correct by clicking Yes, looks good.



If they are not up to date please click Edit to review the details and update them with your new details.

Once payment has been processed, you'll get an email to advise that this has taken place and also when it is expected to arrive in the named account. It does depend on your bank, but it is usually around 3-5 working days.

If you do not have access to any of these pages please get in touch with us and we can review the access on your account.

8. Service standards

Our aim is to deliver an excellent customer experience for all HMCTS customers across all Online Centres. To achieve this, we want each Online Centre to follow the same processes for all customers. Within this consistent approach, you should then feel free to use your expertise and judgement to adapt your approach in meeting the needs of individual customers.

We expect Online Centres to:

Ensure all staff and volunteers delivering the service have a current DBS check in place.

- Ensure all staff and volunteers delivering the service have completed training for this service.
- Risk assess appointments and drop-ins according to your own organisational policy.
- Record outcomes in CaptureIT accurately and in time (within 24 hours of the appointment)
- Be honest, helpful and polite with customers.
- Offer impartial support when helping customers with online forms.
- Be sensitive and adapt to the needs of all our customers.
- Let customers know what happens next and how to check progress.
- Protect customer's personal documents and information.
- Take complaints seriously, investigating them and providing a considered response.

Service level agreements:

- At least 90% of appointments are within 10 working days of the referral.
- At least 90% of CaptureIT data is input accurately within 24 hours of the appointment.
- At least 95% of appointments start within 10 minutes of their scheduled time.
- At least 90% of customers complete their online process.
- At least 90% of all service customers rating 9 or above on the exit survey.
- At least 98% of complaints received are resolved within 5 working days