ADULT DISABILITY SRTI PAYMENT CHECKLIST

NOTE: If the client dies during the application process do not carry the check out, advise this within the feedback box on the spreadsheet. If the client dies whilst they are in receipt of ADP carry out the check as normal.

Client Adviser checks	COMPLETED / STANDARD MET
• Check SRTI application form has been uploaded to SPM.	
• Check application form has been signed and dated. (there will be no signature if a 3rd party has submitted the application).	
• Check client's name, address, postcode, NINO, nationality and date of birth match application form. Check for delivery address suffix and alternative accommodation.	
• GUID confirmed. (Client Contact under Interactions).	
• Check client's name for duplicate record.	
• Check Appointee or POA name, address, postcode, NINO and date of birth match application form and for duplicates.	
Check one of the following SI has been received: • BASRiS • Verbal BASRiS from health care practitioner (this can be found within the application under meeting minutes). • DS1500 • SR1 Who's eligible under special rules | Social Security Scotland Recording the date of clinical judgement or date of diagnosis on SPM | Social Security Scotland	

[Confirming the date of clinical judgement of terminal illness | Social Security Scotland](#) [How to review a BASRiS form | Social Security Scotland](#) [Process SR1 forms 2023 and 2022 versions | Social Security Scotland](#) [BASRiS, DS1500 or SR1 forms received with no application | Social Security Scotland](#)	
• Check the above SI is signed, dated and the health care workers registration number and details are shown.	
Check the medical evidence within the application case to confirm the following information has been added from the SI, • Awareness of terminal illness, **(this will determine what letter is issued to the client)** • CHI number • Date of clinical judgement (DOCJ) • Date health care professional was contacted • Health care professional name • GMC/NMC number added	
• Has the eligibility check been run and passed and all verifications cleared on application case.	
• Check appropriate notes have been left by client advisor.	
• Check the application has been processed within 7 working days from receipt of SI.	
Case Manager Application Case	**COMPLETED / STANDARD MET**

	COMPLETED / STANDARD MET
• Has the eligibility check has been run by the case manager and correct amount is showing.	
• Check appropriate notes have been left by case manager.	
Decision Screen	**COMPLETED / STANDARD MET**
• Check within the free text justification box that the wording **SRTI** has been entered.	
• Check guidance has been referred to. (ADP decision case > Contact > Notes).	
Case Manager Product Delivery Case/Integrated Case	**COMPLETED / STANDARD MET**
• Determination check. Confirm correct payment amount is showing.	
• Check the correct start date is showing.	
• Check bank details under Financials. (Nominee should match client's bank details in client's case).	
HOUSEKEEPING	**COMPLETED / STANDARD MET**
• Outstanding tasks cleared in application case, client contact, integrated case and product delivery case.	
• Where a task has been left outstanding, has a note been left explaining the reason for this?	
• Case ownership correct. (Ownership should show as ADP Disability Benefits).	
• Quality check note added. (Application case > Administration > Notes). Suggested text: **Subject:** Quality Support Team **Body:** Quality Support Team check complete. [Insert U- staff number].	

COMMUNICATION CHECK (if applicable)	COMPLETED / STANDARD MET
• Check client communication preference has been considered.	
• Appropriate greeting used.	
• Call identification completed as per guidance. If it was a fail, did the call end appropriately.	
• Has the client been made aware the calls are being recorded (outbound calls only).	
• Voice, tone and inflection.	
• Effective listening to the client and identifying their needs.	
• Call structure; gathering information on query and checking understanding.	
• Closure of call, including effective wrap-up.	
• If applicable, was an answering message left for client as per guidance?	
• If applicable, was a warm transfer completed?	
• Appropriate note left in communications with detailed information of telephone call or webchat.	
LETTER CHECK	**COMPLETED / STANDARD MET**
Initial Checks	
• **Check appropriate letter has been issued, this will depend if the client is aware of their prognosis or not which letter the system will generate.**	
• Has the certificate of entitlement and passporting letters been issued to the	

client (usually 3 days after the outcome letter has been issued).	
• Check client's preferences for alternative formats, such as easy read, Braille, or a different language. If yes, check translation process was completed.	
• Check for representative or correspondence address.	
Correct Manual Letter	
• Check letter issued is correct, such as supporting information letter or award letter.	
• Check correct letter template is used.	
• Check letter reflects the decision and amount on SPM.	
• Have all adaptable fields been updated?	
Personal Information	
• Full name.	
• Address.	
• Postcode.	
• Correct date.	
• Social Security letter head used.	
• Correct signature is on the letter.	
• Check return address on the letter.	
Overall Format	
• Correct spelling and grammar.	
• Any manual content uses Plain English.	
• Ensure the correct format is used and font is Arial 12pt as per Social Security Scotland guidelines.	

• Check any highlighted parts or comments on any manual letters issued are removed.	
• Check equal spacing between paragraphs.	
Final Checks	
• Letter uploaded to SPM.	

HOUSEKEEPING

FEEDBACK

CONTINUOUS IMPROVEMENT /ACTION TAKEN