Social Security Scotland
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Adult Disability Payment Checklist – Client Adviser

Client Adviser checks	Completed/Standard Met
• Check adult disability application form has been signed and dated.	
• Check Part 2 has been returned within timescales. Reason given for late submission should be recorded, if applicable. – Medical Evidence.	
• Is application date correct?	
• 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 the duplicate record has been made and merged if applicable.	
• Check appointee or third-party name, address, postcode, NINO and date of birth match application form and for duplicates.	
• Have appropriate SRTI steps been taken? **(there is a separate checklist for SRTI cases)**	
• Past presence PDF uploaded if applicable.	
• Supporting Information – Has it been requested & contacts updated? Client Adviser should only be contacting the client if they said they are providing SI and it's not came in, or if they need help.	
• Check any supporting information is appropriately redacted if it contains third party or incorrect data.	

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• Check all Verifications have been cleared.	
• Check eligibility.	
• Check appropriate notes have been left to advise the case has been submitted to the FDWQ, detailing any work undertaken or calls made on the part one.	
Client Adviser Housekeeping	**Completed/Standard Met**
• Check if any Adult Disability Payment outstanding tasks are from the client adviser. Have any notes been left to explain the reason for this?	
• Have all contact preferences been taken into account? (letters and phone calls)	
• Quality check note added. **Subject:** Pre-payment check **Body:** Pre-payment check completed by [insert U- staff number].	
Communication Check (refer to separate communications check sheet, below for information only)	**Completed/Standard Met**
• Check client communication preference has been considered.	
• Appropriate greeting used.	
• Call identification completed as per guidance (if fail call ended appropriately).	
• 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.	

Feedback for case check

Feedback for communications check

Continuous Improvement /Action Taken