



Adult Disability Payment Checklist – Case Manager

Case Manager Decision Making Tools	Completed/Standard Met
<ul style="list-style-type: none"> If applicable was a call made to the client and a note left detailing content of call? (This will be applicable to any case that a client has not signed up to receive an email/text notification) 	
<ul style="list-style-type: none"> Has the case manager confirmed that there is a confirmation from a professional which broadly confirms the condition, disability or needs of the client? 	
<ul style="list-style-type: none"> Have any gaps/inconsistencies been resolved? 	
<ul style="list-style-type: none"> Have the appropriate decision making tools been utilised? 	
<ul style="list-style-type: none"> If supporting information was required was it requested from the most relevant contact at the relevant time? 	
<ul style="list-style-type: none"> And were all reasonable attempts made to obtain supporting information? E.g. were three calls made to client to request information 	
<ul style="list-style-type: none"> Check the backwards and forwards tests have been met. 	
Case Manager Justifications	Completed/Standard Met
<ul style="list-style-type: none"> Check all the Daily Living and Mobility activities noted in the application form have been selected and justified in the ADP questionnaire. 	
<ul style="list-style-type: none"> Did the CM make and justify their decision using appropriate decision making principles? <p>Principles of decision-making Social Security Scotland</p>	



<ul style="list-style-type: none"> Does justification contain enough information and sufficient detail? 	
<ul style="list-style-type: none"> Has appropriate spelling and grammar been used? 	
<ul style="list-style-type: none"> Check all supporting information has been listed in the appropriate area to show the client how the decision was reached (including phone calls to gather SI and case discussions) 	
<ul style="list-style-type: none"> Check start dates for Daily Living and Mobility are recorded correctly. 	
<ul style="list-style-type: none"> Check review period has been chosen and justification is clear. 	
<ul style="list-style-type: none"> If indefinite award, confirm case discussion and checked by Decision Team Manager. 	
<ul style="list-style-type: none"> If Part 2 was late, check reason for accepting/refusing is included within decision (not written in guidance but this has been raised as a trigger for redetermination or appeal). 	
<ul style="list-style-type: none"> Check guidance has been referred to. (ADP decision case > Contact > Notes). 	
Case Manager Application Case	Completed/Standard Met
<ul style="list-style-type: none"> Check eligibility. 	
Case Manager Product Delivery Case/Integrated Case	Completed/Standard Met
<ul style="list-style-type: none"> Check Manual Eligibility Check has been run. 	
<ul style="list-style-type: none"> Check the correct start date for payment is showing. 	
<ul style="list-style-type: none"> Determination check. Confirm correct payment amount is showing. 	
<ul style="list-style-type: none"> Check bank details under Financials. (Nominee should match client's bank details in client's case and application form). 	



Housekeeping	Completed/Standard Met
<ul style="list-style-type: none"> Check there is no end date for the NINO 	
<ul style="list-style-type: none"> Have all contact preferences been taken into account? (letters and phone calls) 	
<ul style="list-style-type: none"> Outstanding tasks cleared in application case, client contact, integrated case and product delivery case relating to Adult Disability Payment. 	
<ul style="list-style-type: none"> Check if any outstanding tasks are from the case manager. Has a note been left to explain the reason for the open task(s)? 	
<ul style="list-style-type: none"> Case ownership correct. (Ownership should show as ADP Disability Benefits) for Product Delivery Case 	
<ul style="list-style-type: none"> Quality check note added. (Application case > Administration > Notes). Suggested text: Subject: Pre-payment check Body: Pre-payment check completed by [insert U- staff number]. 	
COMMUNICATION CHECK (if applicable)	COMPLETED / STANDARD MET
<ul style="list-style-type: none"> Check client communication preference has been considered. 	
<ul style="list-style-type: none"> Appropriate greeting used. 	
<ul style="list-style-type: none"> Call identification completed as per guidance. If it was a fail, did the call end appropriately? 	
<ul style="list-style-type: none"> Voice, tone and inflection. 	
<ul style="list-style-type: none"> Effective listening to the client and identifying their needs. 	
<ul style="list-style-type: none"> Call structure; gathering information on query and checking understanding. 	
<ul style="list-style-type: none"> Closure of call, including effective wrap-up. 	



<ul style="list-style-type: none"> If applicable, was an answering message left for client as per guidance? 	
<ul style="list-style-type: none"> If applicable, was a warm transfer completed? 	
<ul style="list-style-type: none"> Appropriate note left in communications with detailed information of telephone call or webchat. 	
LETTER CHECK	COMPLETED / STANDARD MET
Initial Checks	
<ul style="list-style-type: none"> Check client's preferences for alternative formats, such as easy read, Braille, or a different language. If yes, check translation process was completed. 	
<ul style="list-style-type: none"> Check the letter is going to the correct person – check for representative/appointee or correspondence address 	
Correct Manual Letter	
<ul style="list-style-type: none"> Check letter issued is correct, such as supporting information letter or award letter. 	
<ul style="list-style-type: none"> Check correct letter template is used. 	
<ul style="list-style-type: none"> Check letter reflects the decision and amount on SPM. 	
<ul style="list-style-type: none"> Have all adaptable fields been updated? 	
Personal Information	
<ul style="list-style-type: none"> Full name. 	
<ul style="list-style-type: none"> Address. 	
<ul style="list-style-type: none"> Postcode. 	
<ul style="list-style-type: none"> Correct date. 	
<ul style="list-style-type: none"> Social Security letter head used. 	
<ul style="list-style-type: none"> Correct signature is on the letter. 	



<ul style="list-style-type: none">• Check return address on the letter.	
Overall Format	
<ul style="list-style-type: none">• Correct spelling and grammar.	
<ul style="list-style-type: none">• Any manual content uses Plain English.	
<ul style="list-style-type: none">• Ensure the correct format is used and font is Arial 12pt as per Social Security Scotland guidelines.	
<ul style="list-style-type: none">• Check any highlighted parts or comments on any manual letters issued are removed.	
<ul style="list-style-type: none">• Check equal spacing between paragraphs.• Letter uploaded to SPM.	
Final Checks	
<ul style="list-style-type: none">• Letter uploaded to SPM.	

Feedback for case check

--

Feedback for communication check

--

Continuous Improvement

--