

CAB recording of client information

An overview of the CAB recording system

Citizens Advice



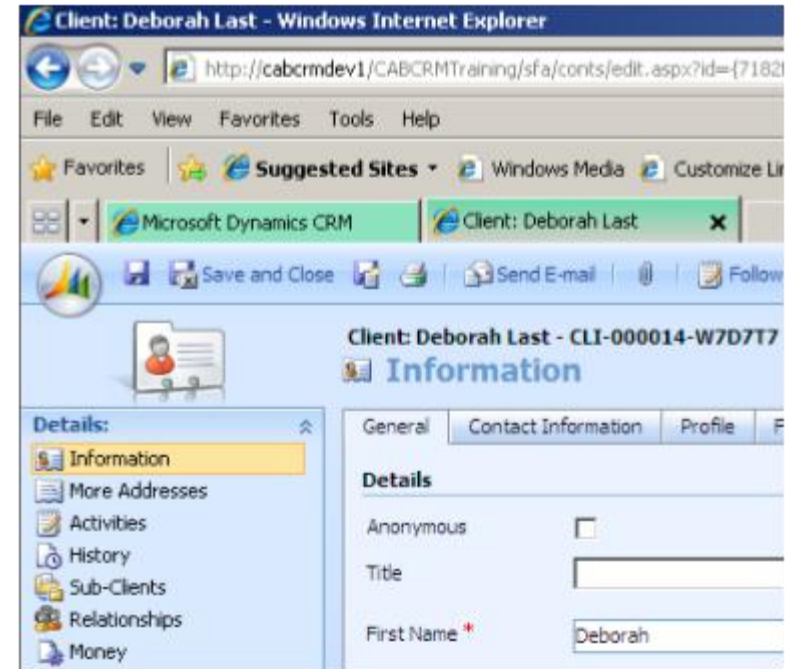
CAB data gathering

- Individual records for 7.1m issues for 2.1 m clients.
- Must record client information.
- Must capture advice given.
- Must categorise work loads – signposting, information, advice
- Must give a breakdown of enquiry area eg. Benefits.
- Must support CAB policy work.

A familiar Microsoft look and feel

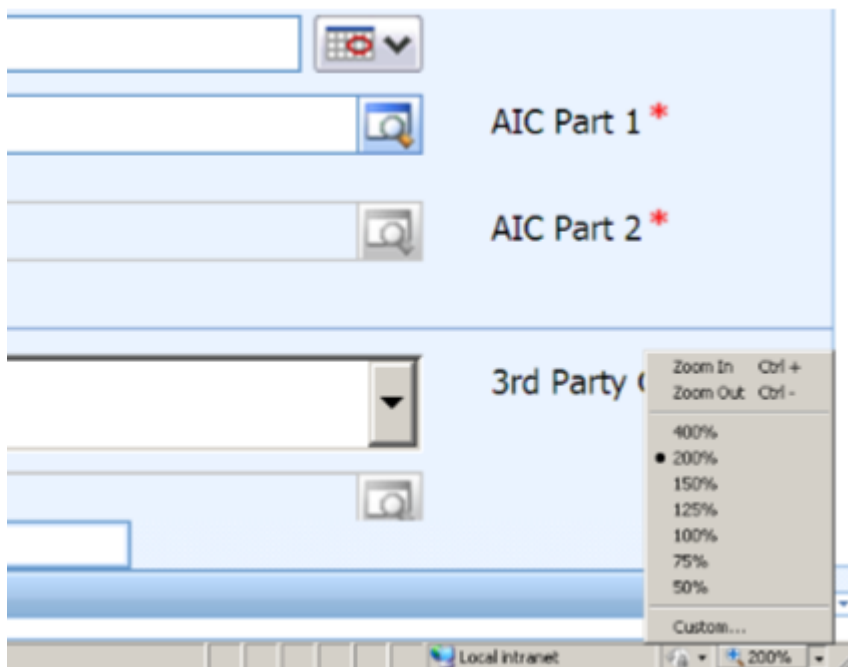
The CRM layout is similar to Microsoft Outlook

- 'Tabbed browsing' will allow you to have all of the information you want available on different screens (tabs)
- Includes a range of Browser functions, e.g. The back button
- The CRM integrates with Microsoft Office products like Excel and Word



Accessibility

We've worked with Microsoft to make the system as accessible as possible to all users.



The example here shows Microsoft Internet Explorer's ability to resize entire screens.

The CRM will work with the JAWS screen reader and Dragon voice recognition software.

Client information

http://cabcrmdev1/ - Client: New - Windows Internet Explorer

Save and Close | QAS Rapid Search | Assessment Questions | Scan and Attach | Batch Scan | Help

Client: New

Information

General Tab | Contact Information Tab | Profile Tab | Further Details Tab | Consult Supervisor Tab

Details Section

Anonymous	<input type="checkbox"/>	Bureau	<input type="text" value="Site 1"/>
Title	<input type="text"/>	Data Protection Consented	<input type="checkbox"/>
First Name *	<input type="text"/>	Date of Check (DD/MM/YYYY)	<input type="text"/>
Middle Name	<input type="text"/>	Consult Supervisor Before Advising	<input type="checkbox"/>
Last Name *	<input type="text"/>		
NI Number	<input type="text"/>		

Age Details Section

Date of Birth Unknown	<input type="checkbox"/>	Age	<input type="text"/>
Date of Birth (DD/MM/YYYY) *	<input type="text"/>		

Address Section

Address Name	<input type="text"/>	Extra Address Information	<input type="text"/>
Address Line 1	<input type="text"/>	No Post Code	<input type="text"/>
Address Line 2	<input type="text"/>	Address Cannot Be Used	<input type="checkbox"/>

Details:

- Information
- More Addresses
- Activities
- History
- Sub-Clients
- Relationships
- Workflows
- Audit
- Money Advice
- Enq as Second Client
- Gateway
- More Names
- BEFs
- LSC Admin

Sales:

- Opportunities

Service:

- Enquiries
- Contracts

Status: New

Client profile

Client: New
Information

General Tab | Contact Information Tab | **Profile Tab** | Further Details Tab | Consult Supervisor Tab

Client Profile Section

Ethnic Origin *	White - English	Religion/Belief	
Disability/Health Problems *	Not disabled/no health problems	Surname at Birth	
Type of Disability/Condition		Place of Birth	
Gender *	Female	Sexual Orientation	
Gender Details		In Care/Care Leaver	
Marital Status	Married/Cohabiting/Civil Partnership	Offender/ Ex-offender	
Nationality			

Housing Section

Household Type		Homeless Application Made	<input checked="" type="radio"/> No <input type="radio"/> Yes
Housing Type		Landlord	
Housing Status		Housing Start Date	
Partner Does Not Live At the Same Address	<input checked="" type="radio"/> No <input type="radio"/> Yes	Housing End Date	
Household Monthly Income			

Status: New

Client – contact information

The screenshot shows a software interface for managing client contact information. The window title is "Client: New" and the main section is "Information". The interface is divided into several sections:

- General Tab**: Contains the "Contact Information Section" with fields for Work Phone, Mobile Phone, Home Phone, Other Phone, E-mail, and Contact Information. Each phone field has a "Can Leave Message" checkbox. The E-mail field has a "Can Send Email" checkbox. The Contact Information field is a large text area.
- Languages Section**: Contains checkboxes for "Can Speak English", "Can Write English", and "Can Read English". It also has fields for "First Language", "Second Language", "First Language - Other Value", and "Second Language - Other Value".
- Services Information Section**: Contains a dropdown for "Preferred Method of Contact" (set to "Any"), a search field for "Preferred User", and a dropdown for "Preferred Day".

The left sidebar shows a navigation menu with categories: "details:", "Sales:", and "Service:". The "details:" category is expanded, showing "Information" as the selected item. Other items include "More Addresses", "Activities", "History", "Sub-Clients", "Relationships", "Workflows", "Audit", "Money Advice", "Enq as Second Client", "Gateway", "More Names", "BEFs", and "LSC Admin".

Enquiry recording

Save and Close | Scan and Attach | Batch Scan | Help

Enquiry: New

Information

General Tab | Websites Tab | Additional Information Tab | Project Tab | Follow-Up Tab | Referrals Tab

Details Section

Short Description *	Eliza's job allowance	Client *	Doolittle, Eliza
Enquiry Type *	Benefits	Gateway Assessment *	GAI-000021-D1Z1B1
Enquiry Created On *	10/02/2011	Bureau	Site 1
Enquiry Origin	Face to Face	Outreach	
National Project/Funder *	CORE	Second Client	
Local Project/Funder		Client's Proxy	
Work Level	Advice	Referred By	
Urgency	Normal	Referral Details	
Local Classification Code			

Bureau Evidence Section

Potential BEF Status *	Potential BEF - Yes	Has the Client Agreed for Future Contact for BEF?	Not Checked
Description of Social Policy Issue		Media Willing	<input type="checkbox"/>

Conflict of Interest Section

Is There a Conflict of Interest?	Not Checked	Conflict of Interest Checked On (DD/MM/YYYY)	
Conflict of Interest With			

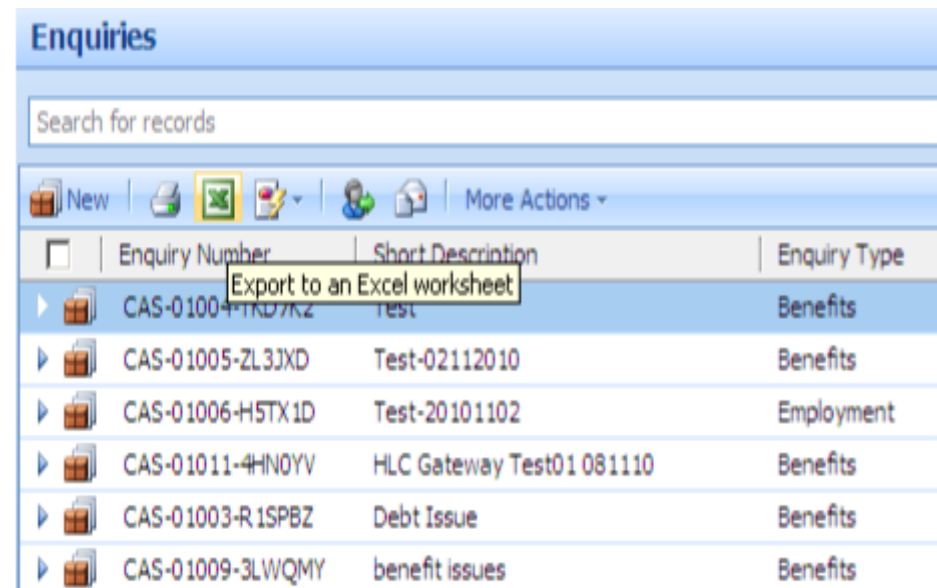
Consent Section

Data Protection Consented?	<input type="checkbox"/>	Client Authorisation Obtained?	<input type="checkbox"/>
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Status: New

Reporting

- Operational reports will be able to show any changes literally just made.
- The standard reports give flexibility to customise them e.g.
You can choose the fields you want to see in your report



	Enquiry Number	Short Description	Enquiry Type
<input type="checkbox"/>	CAS-01004-TRD7KZ	Test	Benefits
<input type="checkbox"/>	CAS-01005-ZL3JXD	Test-02112010	Benefits
<input type="checkbox"/>	CAS-01006-H5TX1D	Test-20101102	Employment
<input type="checkbox"/>	CAS-01011-4HN0YV	HLC Gateway Test01 081110	Benefits
<input type="checkbox"/>	CAS-01003-R1SPBZ	Debt Issue	Benefits
<input type="checkbox"/>	CAS-01009-3LWQMY	benefit issues	Benefits

Easy to generate reports and maps

Citizens Advice Benefits Clients (2010/11) and Indices of Multiple Deprivation
City of Wolverhampton District

