

Diary of a Pensions Adviser (Customer Liaison Manager) 2008

- 8.30** Arrive in work. Check E mails and look at diary. Preview the day's visits, checking what I've got to do to prepare. I need to look at the customers details on our system to see what benefits are already in payment so I have an idea before I go out what they may need. Clear answer phone messages, these can be pretty complicated and there's always a load as most days I'm not in the office after 10am. Make some calls regarding outstanding claims to benefit, chasing up documents.
- 10.00** Collect the car or if the weather is good and the calls local I'll use my bike. Drive to first call. This is a lady in a flat whose name has been flagged up by the council as possibly entitled to extra pension cash – Pension Credit. Find that she lives alone, is partially disabled and gets Attendance Allowance. She has a small pension from her late husband and savings below £6,000 so she is going to get an extra £35.14 per week and free council tax and rent. I help her complete the Pension Credit form. Good start to the day!
- 11.00** Next call, lady to help apply for Attendance Allowance. She is 77, has Arthritis and cannot get in the bath. She has been falling and is having problems moving about and needs help with making her meals and getting up in the mornings. Help her complete her form, which goes off to Cardiff for a decision. I am optimistic she may get help, hopefully the day-care rate of £45 per week.
- 12:00** I've had a visit request from the Pension Centre. The man I'm seeing had £15,000 in savings but it has now gone down to £2,000. I'm hoping this will mean he can get an increase in his Pension Credit as it appears he has spent his savings doing essential work to his home. It is worth letting DWP know of any changes as it can mean extra entitlement.
- 13.00** Lunch, 30 minutes, usually in the car!
- 13:45** Visit to a couple who may be in line for Pension Credit. They are both over 65, he is disabled and his wife cares for him. They had been told they could get the carer's premium of Pension Credit as his wife looks after him but unfortunately because he gets a work pension of £800 per month and has savings over £16,000 they are not entitled.
- 14:30** Called to see a lady I'd visit a few weeks ago. She wanted to thank me as it turned out that she was entitled to an extra £80 a week and a back payment of £1,400. She was so pleased she wanted to give me some chocolates but I had to say no as we cannot accept gifts, unfortunately!!

15:00 Back to office to clear paperwork. Write up my reports for the days visits. Send all the forms to the Pension Centre for processing. Check some results. Book appointments for the forthcoming week either by letter or by telephone. Chase up more claims and read up some new regulations regarding benefits. Take a few phone calls sorting out appointments – people cancel a lot due to hospital appointments. I get quite a few cancellations as people prefer to go shopping, which is a shame as they could be heading out with extra money after one of my visits!

16:35 Time to go home.