

# INT Semi-structured interview script

For remote interviews with intermediaries who help claimants/beneficiaries

v1.0

In advance:

- Explain research, aims and process, discuss and answer queries
- Identify preferred interview channel (telephone, MS Teams, Zoom, other)
- Send information sheet and consent form
- Discuss and answer queries
- Schedule interview appointment
- Receive back consent form

On the day:

- Charge headphones
- Check audio recorder batteries and storage capacity
- Check phone fully charged
- Paper and pencil for notes
- Print interview script
- Ensure save transcript is enabled on Live Transcript app

Set up laptop and desk and workspace:

- Close windows/doors to cut noise
- Music off
- Position audio recorder and phone near laptop speakers on a soft cloth
- Prepare stopwatch
- Phone on silent
- Release secondary screens and close high memory-usage applications
- Write participant name, manager and organisation in hand notes
- Set laptop firewall to silent.

## 1. Introduction

*Hello, and thank you for agreeing to share your experiences of helping citizens make and manage Universal Credit claims.*

*I received your consent form and wondered if any further questions had arisen that you would like to ask? Are you happy to continue?*

*As mentioned, I will record this so that I can transcribe the conversation myself before I study and analyse what you and others say. As we are using MS Teams, I will use its in-built recording facility, and therefore suggest you turn off your video because it is only your words I want to record. Would that be okay?*

*I will click record now:*

- *[Click record on MS Teams]*
- *[Start recording on audio recorded]*
- *[Start stopwatch]*

*I have a series of questions but they are flexible and open-ended, so I can learn about what you think is important and why. I am interested in Universal Credit only but both new claims and ongoing claim management. Although I am particularly interested in people's interactions with the DWP's online systems, rather than say policy/process matters, I am also interested to hear about why some people might avoid using the online systems or how they use alternative channels like telephone, SMS or email in addition to the web site.*

*Initially can we discuss what your experiences were prior to lockdown, and later we can perhaps discuss how lockdown has changed your work to help Universal Credit claimants and beneficiaries.*

Firstly, could you tell me your role?

How long have you been doing this type of work?

What proportion of your appointments are UC as opposed to other benefits or other work?

Do you help with both new UC claims and ongoing claim management?

Are these face-to-face or not, and where do they occur?

## 2. The need for help

*Firstly, thinking about identifying the need for help...*

How do people identify they need help themselves?

Are they encouraged to use the online system? Who by?

For what reasons do people need help most commonly?

*If not clear in the response...* Which technical or other things are causing problems? What is it about the online service that is difficult for your clients? To make a claim, to maintain a claim? Think: language, skills, learning difficulties, confidence, disabilities, email account, auth credentials, documents, identity verification, joint claims, job search, timeliness of messages/responses/actions, advance payment fraud, understanding and complying with commitments, checking conditionality regime)

Why don't they just phone the DWP, ask the Jobcentre or get help to make a claim, the service provided via Citizen's Advice.

Can people request a home visit by DWP to make a claim? And then that is via telephone? Can they receive ongoing support to maintain their claim?

Are these mainly one-offs or are there people you help regularly? What proportion/how often?

What do they use to access the internet and the UC online system?

Think mobile vs fixed connections, locations, type/size of device and ownership

How do people receive communications from DWP once they have submitted a claim? Which channels (telephone, SMS, email, post... what else)? Do any of these cause difficulties?

## 3. Arranging client appointments

*So, thinking about when an appointment is arranged...*

How does contact occur and how are appointments arranged? Do you arrange this with the client directly, or does someone else do it?

*If not clear in the response...* are appointments made face-to-face, or by phone, or by email, or other, and if more than one method how do they vary, and where/how is the information recorded?

## 4. The appointment itself

*Thinking now about the appointment meeting itself...*

What do clients typically need to bring to these meetings and how are they informed of this?

Do they usually have everything?

*If they do not... why...is it because they forgot or something else, and are their explanations excuses or genuine and convincing?*

*If they do not... what problems does this lead to? (effect on the client and effect on advisor)*

If you access the online systems together, what problems occur with the online system?

Think: language, skills, learning difficulties, disabilities, email account, auth credentials, documents, identity verification, joint claims, job search, timeliness of messages/responses/actions, advance payment fraud, understanding and complying with commitments, checking conditionality regime)

What one thing (magic tech) would help you do this work?

What do you think claimants' answer to the same question would be?

What help do claimants need but you cannot provide?

How do you handle login details, and signing declarations/submissions?

## 5. COVID-19

What has changed before/during lockdown?

Think referrals, type of work, type of technical issues people have, type of claimants

What has become more difficult for you?

And for claimants?

What has been lost, that you think was better face-to-face?

Are some claimants/beneficiaries less likely, or less able to ask for or receive help?

Has anything become easier?

How do you access/view/submit data together to DWP?

## 6. Closure and debrief

*That's all my questions, but I wondered if there is anything else you think is relevant or would like to add?*

*I will be using the transcripts of these interviews in my research, together with data from surveys and workshops, to inform the design and trial of a prototype. All data will be anonymous. I will keep you informed of how my work progresses. I will turn off recording now.*

*[Stop all recording and timing]*

*Thank you again.*

Afterwards:

- Copy/download to laptop
  - Audio recording
  - MS Stream recording and transcript
  - Live Transcript text
- Add participant to lookup-sheet
- Update these notes with any amendments, creating a new version
- Email interviewee to thank them and provide debrief again