

GIVING CLIENTS EXTRA SUPPORT WHEN THEY NEED IT

Useful tools and information to help you identify and support clients in vulnerable situations.





THE ACRONYMS

When to use them

BRUCE – will help you spot the signs of a client that needs extra support

TEXAS – is an easy way to check if the client is happy for you to record information about them

CARERS – tips for speaking with a third party without authority

BLAKE – will help you support someone who's distressed



1 in 8

care for others



1 in 6

adults have poor
literacy skills



11 million

are hearing
impaired



2 million

are impacted
by gambling



1 in 4

experience a
mental health problem



1 in 2

will get cancer



3 minutes

Dementia
diagnosis



8.3 million

are in
problem debt

DEFINITIONS

Vulnerabilities can be permanent or temporary, impacting clients at different stages of their lives. There are four areas we need to be aware of.



Health

Someone who's ability to carry out day-to-day activities is limited due to health conditions or illness.

- Mental health problems
- Physical disability
- Illness such as dementia



Life events

These are major life events that have happened in the last twelve months.

- Divorce
- Caring responsibilities
- Death of a close family member



Financial

An event that has impacted a person's financial capability and/or resilience.

- Drop in income
- Low knowledge of financial matters; or
- Managing investments



Exclusion

Someone who is unable to access our services or get the support they need because they fall outside of regular processes.

- Visually impaired
- Hard of hearing
- Struggles to communicate by telephone



CLASSIFICATION

We classify vulnerabilities into chronic (permanent) and acute (temporary):

- Chronic vulnerability affects a person throughout their life e.g. blindness
- Acute vulnerability affects a person for a short or defined period of time e.g. bereavement

No two vulnerable clients are the same.

TOP



TIPS

Expectations – at the beginning of the call outline the information that's needed and how long the call might last

Structure – tackle each issue at a time and clarify their understanding at key points
E.g. "is everything we've discussed clear?"

Patience – make it clear there's no rush to make a decision. Do they need to think a little longer about their options?

Together – do tasks with them not for them

Presence – if you're on the phone, sit up straight with your feet flat on the ground - your voice will be much clearer this way. If you're in person don't stand too close and use positive open expressions

Empathise – don't sympathise. If they seem distressed ask direct, clear questions to understand

Control – allow the client to choose the channel of communication that works best for them. Would it help to send a summary of your conversation in writing?

Interact – at their own pace and time, would they prefer to have someone else present?

Keep it simple – explain the client's options clearly without using jargon. Make sure they understand how they will be impacted by their choices

Most importantly, listen to them

“

Is everything we've discussed clear?



MENTAL CAPACITY

Mental capacity is the ability to make independent decisions about your property, finances and health.

- 1 Always assume capacity
- 2 Provide reasonable support
- 3 Accept clients can make unwise decisions
- 4 Act in the client's best interest
- 5 Take the least restrictive option

MENTAL CAPACITY

Behaviours that may be signs a client is experiencing mental capacity limitations.

- A **third party** is prompting in the background or takes over the call
- They struggle to **recall or communicate** basic personal information
- They become unexpectedly and **highly emotional**
- They struggle to **understand** information
- They provide **conflicting** information
- They're **unaware** of decisions they've made or conversations they've had recently
- They are **repeating** themselves
- Their conversation appears extreme or **erratic**
- Someone mentions they're **moving into care** or in with family
- They tell you they have a **condition** – such as dementia, mental health issue or learning difficulty
- A **third party** – such as a relative, friend or an official – raises a concern which needs to be investigated further

GOOD TO KNOW

You must always assume someone has capacity to make decisions. If you're concerned ask the client if there is someone else there to help or if they have a representative in place. If you're at all unsure speak to your Team Leader.



BRUCE

Help with spotting the signs

BRUCE will help you to spot the signs of a client that needs extra support

BEHAVIOUR AND TALK	Keep an eye out for clients having difficulty with the following...
REMEMBERING	<p>Is the client showing any problems with their memory or recall?</p> <p>“Would it be helpful if I went over it again?”</p> <p>“Would it be helpful if I put that in writing?”</p>
UNDERSTANDING	<p>Does the client understand the information you’ve given them? The decisions they need to make, why, and what happens next.</p> <p>“Do you want to tell me what you’ve understood so far and I can fill in the gaps?”</p> <p>“Is there someone who usually helps you with your finances?”</p>
COMMUNICATING	<p>Can the client communicate their thoughts, questions and decisions about what they want to do? Are they stressed or asking the same question repeatedly?</p> <p>“Is there another way you’d like us to communicate with you?”</p> <p>“Would you like me to call back at another time?”</p> <p>“Take your time”</p>
EVALUATING	<p>Can the client ‘weigh-up’ the different options presented to them? Are they reliant on a third party to help them make decisions?</p> <p>“Would it be helpful to go through each option again?”</p> <p>“Do you have someone you normally talk these things through with?”</p>



GOOD TO KNOW

You're not expected to make a diagnosis. Only record what the client needs from us.


Speak to your team leader for more information or contact vulnerableclients@hl.co.uk

TEXAS

Getting consent to record extra
support needs

TEXAS is an easy way to check if the client is happy for you to record information about them.

THANK THEM	"Thank you for letting me know about your situation. This will help us support you better"
EXPLAIN	"I'll put a note on your account so you don't have to repeat yourself" "We won't share this information with anyone outside of HL"
GAIN EXPLICIT CONSENT	"Are you happy for me to make a note of what you've shared with me today? "
ASK (to help you understand)	"Is there anything you'd like us to do which will help?" "Do your circumstances make it difficult to manage your account or communicate with us?" "Do you have any help, for example from a family member?"
SIGNPOST	"Some of our clients have found it helpful to speak to"



GOOD TO KNOW

- Only record what the client needs from us.
- Record on the client's account if you've signposted to another organisation (see signposting for options).

You don't have to collect consent if...

- The client doesn't have the mental capacity to give consent
- Asking for consent would cause the client to isolate themselves from our services or distress
- The client is at risk of harm

Speak to your team leader if you're at all unsure.


CARERS

Speaking with a third party

CARERS

Tips for speaking to a third party without authority.

CHECK FOR AUTHORITY	If the third party cannot supply evidence of their authority (POA) or needs to share information about the client now, the following steps should be taken.
AVOID SHARING DETAILS	Make sure to explain to the third party why this isn't possible.
REASSURE	Their concerns will be listened to, and looked into.
EXPLAIN	Make it clear that if a note is taken of their concerns, these will be recorded as observations (unverified) until looked into.
RECORD THEIR OBSERVATIONS	<p>Make sure you listen carefully and ensure:</p> <ul style="list-style-type: none">• You've checked why the client is unable to speak directly (e.g. the client has speech difficulties).• You've confirmed what information has been recorded, and how long these observations will be held on file while they're being checked.
SUMMARISE	What you have agreed and make sure the carer can confirm this.

 **GOOD TO KNOW**

Next steps to help you and the third party

- You (or a colleague) should try to discuss the situation with the client. This should include checking what the third party has observed about the client is correct

And/Or

- The third party to discuss with the client about acting on their behalf (Power of attorney or letter of authority)

BLAKE

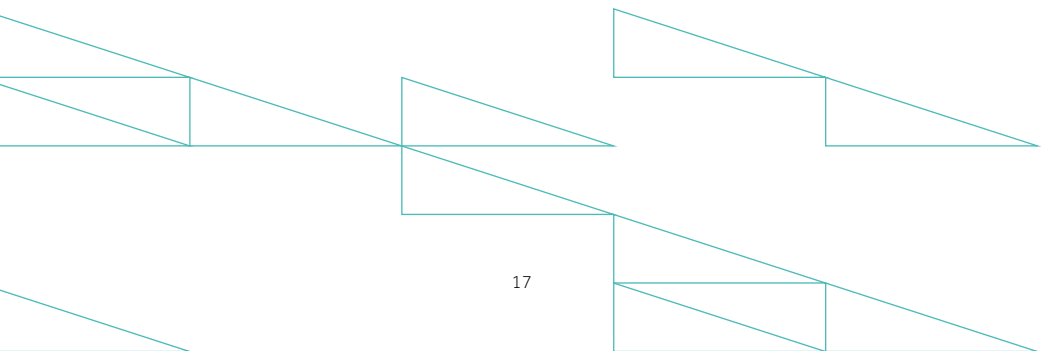
Supporting someone in distress

BLAKE will help you support someone who's distressed

BREATHE (TO FOCUS)	Take a moment and acknowledge them, "I'm so sorry to hear you feel that way. How I can help?"
LISTEN (TO UNDERSTAND)	Always treat what the client is saying seriously. Listen out for signs of imminent risk. You do not have to provide a solution – you just have to listen. This shows that you care and you want to know more.
ASK (TO DISCOVER)	"Where are you now?" "Is there anyone you can speak to?" "Is there anything I can do which will help you now?"
KEEP SAFE (FROM HARM)	"It may be helpful to speak to someone who may be able to provide the right emotional help you need. Have you thought of speaking to the Samaritans? Or maybe another listening organisation?" "Would you like me to call you back at a later time and see if you're feeling any better?"
END (WITH SUMMARY)	"Before we finish, lets recap and talk about what's next"

If you feel there is an immediate risk then keep the client on the phone and message your Team Leader or Client Protection asking them to contact the police.

Signpost to the Samaritans on 116 123.



SIGNPOSTING

It is not our role to provide specialist support or care. If you believe someone could need extra support there are a number of organisations you can refer them to.

- ✓ Provide the client with a contact telephone number for a support line (using the list below). They may not be ready to speak right now

- ✓ If they're ready to go ahead offer a warm transfer and pass them over to the support centre

Make sure you record on the client's account if you've signposted and who to.

Age UK (support for older people)

📄 www.ageuk.org.uk

☎ 0800 055 6112

Alzheimer's Society

(support for living with Dementia)

📄 www.alzheimers.org.uk

☎ 0300 222 11 22

Citizens Advice

(financial support)

📄 www.citizensadvice.org.uk

☎ 0344 411 1444

Cruse Bereavement Care

(coping with a death)

📄 www.cruse.org.uk

☎ 0808 808 1677

GamCare (support with gambling)

📄 www.gamcare.org.uk

☎ 0808 8020 133

Macmillan Cancer Support

(cancer support line)

📄 www.macmillan.org.uk

☎ 0808 808 00 00

MIND (mental health)

📄 www.mind.org.uk

☎ 0300 123 3393

Refuge (domestic abuse)

📄 www.refuge.org.uk

☎ 0808 2000 247

Samaritans (despairing people)

📄 www.samaritans.org

☎ 116 123

Step Change (debt advice charity)

📄 www.stepchange.org

☎ 0800 138 1111

Victim Support (help after a crime)

📄 www.victimsupport.org.uk

☎ 0808 168911

NHS 111 for more help

(non-emergency)

A close-up, profile shot of a woman with dark hair and bangs, wearing black-rimmed glasses and a gold chain necklace with a circular pendant. She is smiling broadly, showing her teeth, and looking towards the right. The background is a blurred office or indoor setting with blue and white tones. A green plant is visible in the foreground, slightly out of focus.

“

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THE 5 WAYS OF WELLBEING

You can only give fantastic client service if you're feeling okay yourself.

- 1 Connect**
Make your and someone else's day better
- 2 Take notice**
Be interested in the world around you, stay curious
- 3 Be active**
Use your body to improve your mind
- 4 Give**
Small things can have the biggest impact
- 5 Keep learning**
Step out of your comfort zone and grow

Our Mental Fitness Group aim to ensure that HL promotes wellbeing, enables open and honest conversation about mental health and supports anyone who encounters mental health issues. Visit the Intranet for resources and contact details

