

 **ADVOCACY TASK LIST + CONSENT FORM**

**SERVICE USER: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ CLOG: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ POSTCODE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Task – Core** | **Y/N** |
| **Post** - Sort, review and file post (action and support when suitable)  |  |
| **Communication –** Support with letter writing and making phone calls |  |
| **Budgeting** - Provide a current income and expenditure statement and if required provide ongoing budgeting support to minimise outgoings (e.g., unwanted DD’s, review utility spending) |  |
| **Benefit check** - Complete benefit check form to maximise income and support any recommended solution |  |
| **Set up direct debits / standing orders** (Rent/Gas/Electric/Water/ Council Tax/Care/Alarm/Telephone/Mobile/TV licence/TV/ Broadband) |  |
| **Open Bank Account** – to enable direct debits and standing orders |  |
| **Debts** – refer Regulated and/or unmanageable debts to StepChange and support any recommended solution |  |
| **Attendance Allowance** – refer to AUKN Advice line for applications/upgrades*\*if ordering forms email* *advice@ageuknorfolk.org.uk* *to advise on the same day the forms have ordered* |  |
| **Task – Other** | **Y/N** |
| **Housing** - Investigate Residential Options and Support |  |
| **SCAM Support** (Trading Standards, Phone blockers etc) |  |
| **Grants** – Research and refer or support to apply for any suitable grants |  |
| **Wills** - Obtain will quotes / free will options and support completion  |  |
| **Lasting Power of Attorney** – Refer to AUKN Advice for a free form fill or support solicitor options if more complex needs  |  |
| **Funeral Plans** - Obtain funeral plan quotes and support completion |  |
| **ReSPECT Process –** Highlight process to client if suitable |  |
| **NCC Financial Assessment –** Support through assessment |  |
| **Advocacy Bereavement –** support through the process |  |
| **General Advocacy -** Please state task- |  |
| **Additional Tasks (Management sign off req.)** | **Y/N** |
| **Third Party Banking** - |  |
| **Other -** Please state task- |  |
| **Manager’s signature:** |  | **Date** |  |

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| **Data Protection Regulations.** |
| Under the General Data Protection Regulation, we are required to explain to users of our services why we collect information about you, how we intend to use that information and whether we will share this information with anyone else. Copies of our Privacy Policy and Privacy Statement are available upon request.In order to help you, we record and store information electronically about you. The law says that we must obtain your consent to do this. Everything you tell us will be treated confidentially. Electronic Records will be kept securely for 6 years and then securely destroyed. |

**Staff to complete:**

**Service Provision & Volunteer Role Explained including DBS / GDPR / Unable to advise on**

**FCA regulated products.**

**If above includes ‘Third Party Banking’ confirm the procedure explained**

**Client to complete:**

* ***I consent to Age UK Norfolk recording personal information about me***
* ***I agree that Age UK Norfolk will assist me with the tasks marked* overleaf but cannot offer me any advice.**

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| **I the service user, agree to the tasks listed overleaf and the statements above** |
| **Name:** |  | **Date:** |  |
| **Signed by Service User:** |  |

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| **I the volunteer, have read the Advocacy Service Manual which includes the Volunteer Guidelines and agree to work within the boundaries of the agreed Task List.** |
| **Name:** |  | **Date:** |  |
| **Signed by Age UK Volunteer** |  |

**Signposting**

Advocacy are unable to support you with the following areas. We can however signpost you to appropriate organisations.

* AUKN Information & Advice line
* Occupational Therapists
* Community Groups
* Pendant Alarms
* Specialist support
* Meal arrangements
* Provide literature of how care charges are calculated
* AUKN guides and factsheets
* NCC (care support)
* Legal support