

Executive summary on Direct Payments research

Objective:

The research was commissioned to help us gain a better understanding of issues such as how our Direct Payments (DP) customers choose to deal with their PAYE schemes, whether they find the process simple or complex and how HM Revenue & Customs (HMRC) could simplify the system and support customers, their agents, and Local Authority workers who deal with DP.

Findings:

DP recipient's found the whole process very daunting and, without the offer of help, many will not enter the scheme. Even then many prefer to use an agent, rather than dealing direct. Overall DP customers and their agents, have a variety of experiences of HMRC, ranging from very positive to very negative.

Local authorities have diverse approaches to DP administration, and the disability audience is very diverse. Additionally local authorities were generally committed to the idea of contracting out the support and management of DP to partner organisations.

There were two requests for improvement made consistently asking for **simplification of the system** and for a **dedicated HMRC service for DP users and their agents**

Computer access and use is by no means universal so HMRC need to continue to deliver a service via a variety of channels such as paper, telephone and face-to-face, as well as electronically.

Given the 'cross-government' nature of initiatives such as Individual Budgets, it is vital that HMRC works with their government partners at all levels and with support and user-led organisations, to create the kind of joined-up, user-friendly service which meets customers' needs.

Employment status issues are recognised as complex, and it is important that HMRC provides a proper education system to DP recipients, local authorities and support organisations.

OUTCOME:

Ideally, the kind of help and support that DP recipients require is:

- ◆ expert, dedicated and knowledgeable about financial management *and* about disability and with the appropriate communication skills
- ◆ flexible, tailored to individual needs / preferences, able to respond to changing needs / preferences
- ◆ accessible without hassle
- ◆ often local
- ◆ good relationships with other relevant agencies, able and willing to act as intermediaries

The closer that HMRC can approach these ideals, the better their service will be to this customer group.