

Child benefit claim pack research summary

Background

Child Benefit Office had a significant workload as a result of errors made by claimants completing the Child Benefit claim form.

The form has been redesigned to help reduce these errors, and also reduce the helpline workload and improve the form filling experience for the claimant. This research aimed to identify any improvement in error rate between the current (October '08) form and the proposed new form, and to suggest any areas which could be revised to improve error rates still further.

Research aims

Based on previous research and feedback HMRC developed a revised Child Benefit claim form and guidance notes.

The next stage was to test this revised form and new guidance notes to determine whether the number of critical errors had been improved and, therefore, whether the amount of rework required by HMRC would to be reduced. To help improve the form, we recommended further improvements and feedback on the use of guidance notes.

Main Findings

Results indicate that the new form performs better than the existing form in terms of participant perceptions and reduction of errors made, including both critical errors (those which impact on HMRC resource required) and non-critical errors (those which may impact on the claimant). Claimant's 'first impressions' suggest the new form is more inviting for a claimant to complete.

Marginally more participants used the guidance notes at least once when completing the new form compared to the October '08 form. However those who used the notes for the new form did so for fewer sections. Help sought by phone and online was similar for both forms – suggesting helpline workload will remain the same. Those who sought help on the new form did so primarily for bank details, so improving this section should help reduce the number of claimants who use the helpline.

Overall Process:

Regardless of the form completed, participants tended to find the process easy. However, 58% of the participants completing the new form found the process 'very easy' against 47% for the October '08 form. Nobody with the new revised form chose the bottom two responses of 'Not very easy' or 'Not at all easy' to describe the process.

Form process:

The number of participants finding it 'very easy' to complete the form was significantly higher for the new revised form, rising from 48% to 59%.

However, the majority of participants thought the form was easy to complete regardless of the form they saw.

Likes and dislikes of the forms tested:

Participants 'likes' were similar for both forms – they were easy to understand / complete and straightforward. The new form was considered to be easy to understand or complete and quick to do, whilst the October '08 form was seen as straightforward.

Confidence

Regardless of the form, the majority of participants were confident they had completed the entire form correctly, although those saying 'very confident' increased significantly for the new form (43% to 53%). There was no specific area on the new form which generated lower confidence.

Perception of Guidance Notes

Only 24% claimed to have looked at the guidance notes on the October '08 form, dipping to 22% for the new form. Of those who did claim to use them the majority found them easy to use with similar ratings noted for both forms tested.

Help sought via helpline and online:

In total, 10% of those completing the October '08 claimed they would consult the phone helpline at least once, compared to 13% among those completing the new form.

Online help remained at a low level, with 4% consulting it for help on the October '08 form and 2% for the new form. It is not thought that this will represent any increase in workload for HMRC, however the low levels of adopting the online help service are concerning, as this is a possible tool for reducing costs, if claimants would be prepared to switch to online help from phone help.