

Detailed instructions on using the Practical Gains Tools

How do the Tools Work?

There are two separate spreadsheets involved in the process of recording and collating the practical gains that you achieve for your clients. These spreadsheets are called:

- the 'Practical Gains Recording Sheet'
- and the 'Practical Gains Results Sheet'

The 'Practical Gains Recording Sheet' spreadsheet is used to capture gains for each individual client.

The 'Practical Gains Results Sheet' spreadsheet collates the data from each of the individual Practical Gains Recording Sheets to produce statistics on gains by subject area for each month of the year and a rolling total for the year so far. To enable this to happen the data from each Practical Gains Recording Sheet has to be manually transferred over to the Practical Gains Results Sheet.

Downloading the software

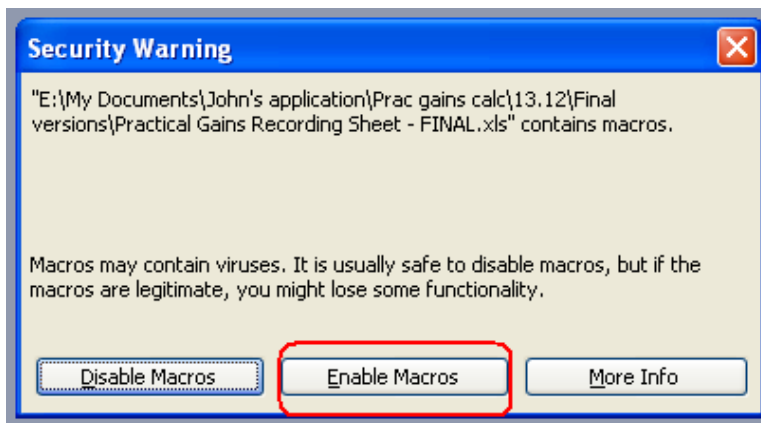
The Practical Gains Tools have been developed using Excel and therefore you will need to have Microsoft Office 97 or later installed on your PC. Both spreadsheets include active content (known as Macros). If you have difficulty downloading the software it is most likely because of the security settings on your PC or network which will not allow the use of software with active content. Please speak to your IT administrator about adjusting your security settings so that you can use this software. If you still have problems with downloading the software please contact Age UK at mark.tomlinson@ageuk.org.uk and we will offer you further IT support.

Alternatively you may get a security message when you download the software about the 'active content'. If you have any concerns about downloading the software you should first check with your IT administrator before progressing beyond this message. If your IT administrator requires further information or assurance about the active content/macros they can contact Age UK at mark.tomlinson@ageuk.org.uk.

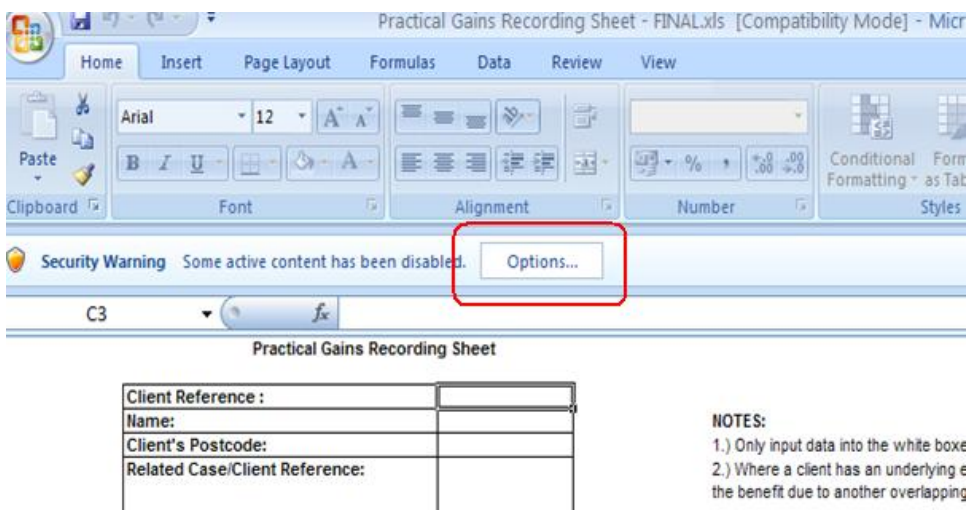
Getting started - Enabling Macros

The first thing that you will have to do to be able to use either spreadsheet is *enable the macros* that are responsible for some of the key aspects of the spreadsheets functionality. On loading the spreadsheet either a security warning will pop up immediately or it will appear in a bar at the top of the spreadsheet.

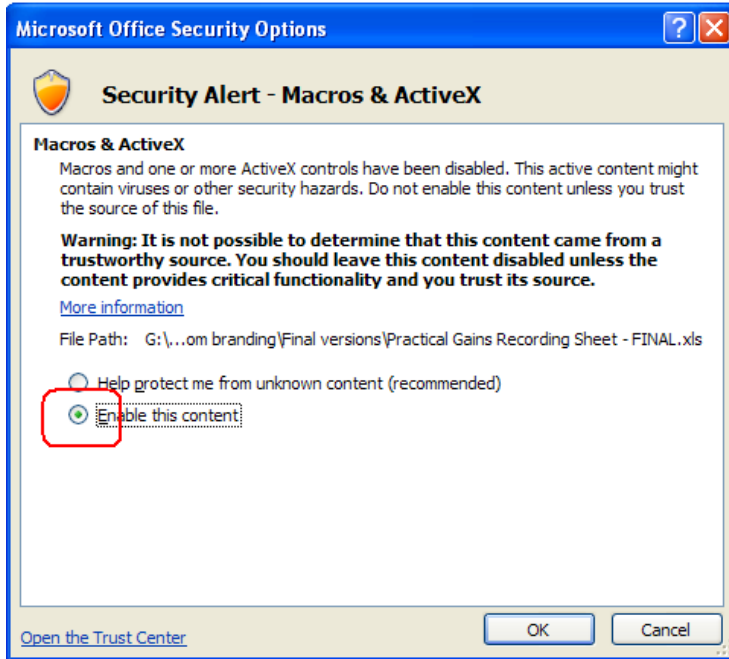
If the warning pops up immediately click the 'Enable Macros' button as shown below:



If the warning appears in a bar at the top of the spreadsheet you will need to click the 'Options...' button in the bar as shown below:



After selecting 'Options...' the following box will appear in the centre of the screen. Please select 'Enable this content' as shown below:



And then click on 'OK' in the bottom right hand corner of the box.

You may also find that you are unable to enable the macros. This is most likely because your macro security level is set too high. To use the software the macro security level needs to be set to 'medium'. You should consult your IT administrator before changing any of your PC's security settings. If your IT administrator requires further information or assurance about the active content/macros they can contact Age UK at mark.tomlinson@ageuk.org.uk.

Using the Practical Gains Recording Sheet

On opening the Practical Gains Recording Sheet you will see a screen that looks like this:

Practical Gains Recording Sheet

Client Reference :	
Name:	
Client's Postcode:	
Related Case/Client Reference:	

NOTES:
1.) Only input data into the white boxes
2.) Where a client has an underlying entitlement but does not receive the benefit due to another overlapping benefit enter 0

Show Money and Benefits

Show Housing Advice and Housing Options

Show Health and Social Care

Show Consumer and Access to Services

Number of Claimants 1

HELP

You should enter your client's unique reference number/case number into the box for the 'Client Reference' and their name into the 'Name' box. It is currently not necessary that you enter your client's postcode as functionality to view statistics via postcodes has not yet been built into the software. The 'Related Case/Client Reference' box is for your own administrative purposes in case you wish to be able to cross reference or link this client to another, for example their partner or carer.

You can then select the type of practical gain you achieved for your client. You do this by navigating a short series of menus. The first menu can be seen in the screen shot above. This menu breaks the gains down by the four key areas of the Age UK I&A flagship service. After selecting one of these options you will be taken to a further more detailed menu relating to gains in that subject area.

So for example if you wished to record that you had helped a client to receive a £200 tax rebate you would firstly select '**Show Money and Benefits**':

Client Reference :	
Name:	
Client's Postcode:	
Related Case/Client Reference:	

Show Money and Benefits

Show Housing Advice
and Housing Options

Show Health and Social Care

Show Consumer and
Access to Services

From the next menu you would select 'Show Taxation Outcomes':

Hide Money and Benefits

Show Welfare Benefits

Show Debt Outcomes

Show Grants and Payments

Show Taxation Outcomes

Show Financial Products/Services

Show Housing Advice
and Housing Options

At this point you have the opportunity to record a 'General Tax Gain' if you wish to only have more limited practical gains data. You would do this by entering a 'Y' in the white box below. However to capture the more detailed gains data about the tax rebate you should instead select 'Show More Detailed Tax Gains':

Hide Money and Benefits

Show Welfare Benefits

Show Debt Outcomes

Show Grants and Payments

Hide Taxation Outcomes

Taxation Outcomes		
	Enter Y if applicable	Enter amount
General Tax Gain		
Show More Detailed Tax Gains		

Show Financial Products/Services

You can now enter the amount 200 into the white box for capturing a **'Tax rebate (amount)'**. Having entered the figure either press 'enter' or click in another box on the spreadsheet to confirm the data entry.

Taxation Outcomes		
	Enter Y if applicable	Enter amount
General Tax Gain		
Hide More Detailed Tax Gains		
Client paying correct amount of tax		
Client paying correct amount of tax		
Tax rebate (Amount)		200.00
Outstanding tax bill reduced, waived or written off (Amount)		0.00
Outstanding tax bill repaid		
Apology or explanation received from Inland Revenue		
Other tax practical gain		
Please state nature of other tax practical gain.		
Appropriate information/advice received		

The same process can be completed for as many gains as are required to be recorded for the client. You can quickly return to the original menu to record a new gain by clicking on the *hide* version of the main menu options buttons. So for example below you would click on **'Hide Money and Benefits'** button:

Practical Gains Recording Sheet

Client Reference :

Name:

Client's Postcode:

Related Case/Client Reference:

NOTES:

1.) Only input data into the white box

2.) Where a client has an underlying the benefit due to another overlapping

Hide Money and Benefits

Show Welfare Benefits

Show Debt Outcomes

Show Grants and Payments

Hide Taxation Outcomes

Number of Claimant

Taxation Outcomes

	Enter Y if applicable	Enter amount
General Tax Gain		
Hide More Detailed Tax Gains		
Client paying correct amount of tax		
Client paying correct amount of tax		

HELP

Using the Help & Guidance sheet

Throughout the spreadsheet you will find **HELP** markers. Clicking on a **HELP** marker will take you to the help page that will provide further guidance about how to enter data into the relevant row of the spreadsheet. So for example, below if you wished to find out more about the 'Other practical tax gain' field you would click on the **HELP** marker to the right:

Hide More Detailed Tax Gains		
Client paying correct amount of tax		
Client paying correct amount of tax		
Tax rebate (Amount)		0.00
Outstanding tax bill reduced, waived or written off (Amount)		0.00
Outstanding tax bill repaid		
Apology or explanation received from Inland Revenue		
Other tax practical gain		
Please state nature of other tax practical gain.		
Appropriate information/advice received		

HELP

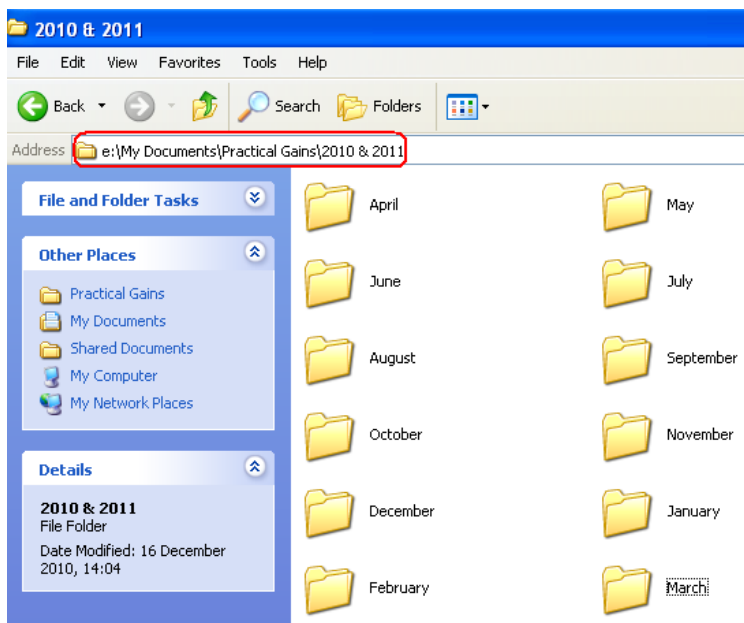
HELP

This would take you to the relevant section of the 'Help& Guidance' page, as can be seen below. Here you will find further explanation of the relevant aspect of the spreadsheet. By clicking on the [HERE](#) marker next to the relevant guidance you will be returned to the data entry sheet.

Other Practical Gain - If the practical gain that your client has received was not included in the data entry form please tick this box and provide a brief description of the gain in the next box on the data entry sheet. Age UK will analyse the other practical gains that have been recorded in these boxes to improve the future versions of this tool.	To return to data entry sheet click HERE
Appropriate Information/Advice Received - If the nature of the work undertaken with the client meant that you are unable to ascertain whether they received any practical gain from your service you can enter a 'Y' in this box to record that they did receive either information and advice that was appropriate to their enquiry.	To return to data entry sheet click HERE
General Tax Gain - Use this box if you only wish to record a general tax gain and do not wish to enter more specific detail about the nature of the gain. Please note that if you do enter more detail about the tax gain this box will be cleared to avoid double counting in the results package.	To return to data entry sheet click HERE
Other Practical Gain - If the practical gain that your client has received was not included in the data entry form please tick this box and provide a brief description of the gain in the next box on the data entry sheet. Age UK will analyse the other practical gains that have been recorded in these boxes to improve the future versions of this tool.	To return to data entry sheet click HERE
Appropriate Information/Advice Received - If the nature of the work undertaken with the client meant that you are unable to ascertain whether they received any practical gain from your service you can enter a 'Y' in this box to record that they did receive either information and advice that was appropriate to their enquiry.	To return to data entry sheet click HERE
General Financial Product/Service Gain - Use this box if you only wish to record a general financial product/service gain and do not wish to enter more specific detail about the nature of the gain. Please note that if you do enter more detail about the financial product/service gain this box will be cleared to avoid double counting in the results package.	To return to data entry sheet click HERE
Client supported to choose a pension annuity provider/type - Obviously an Age UK I&A service is not allowed to give financial advice, however we can support a client to consider different types of financial products and support them to use comparison sites and guidance to compare different providers.	To return to data entry sheet click HERE

Saving your client's details

Once you have completed entering the practical gains achieved for the client you need to save the spreadsheet. We would recommend that you save the document with a name that includes the client's name or unique reference number and that you also save the document into a folder with the name of the month into which you want their data to be included to produce your statistics. An example of how we would recommend you organise your data can be seen below. You will see that there are 12 monthly folders within a folder for the year ('2010 & 2011'), which is itself within a folder for holding all practical gains data:



How many clients in a case?

Following consultation with local Age UKs the spreadsheet has been designed so that you can, if required, capture practical gains for both members of a couple and an

external carer on one sheet. If you prefer to either treat all three as individual cases/clients or the couple as a separate case/client from the carer then you can simply use a new spreadsheet for each.

When entering welfare benefit details for couples you will sometimes be required to state the number of claims (e.g. if both have been awarded Attendance Allowance). In cases where there are two individual claims to a benefit you should enter the amount of their joint weekly awards and state that there are two claims, as can be seen in the Attendance Allowance example below:

Disability Benefits					
Benefit	Weekly Amount	Annual Amount (x52)	Backdated Award	Information Status	Number of Claimants
Hide AA Claim(s)					
AA new claim(s)	95.60	4971.20			2

This is also explained in the **HELP** section that can be accessed from the spreadsheet.

When recording welfare benefit gains for a carer as a separate case/client you may wish to do so in the section specifically for '**External Carers Benefits**' which you will find below '**Client/Partner Benefits**' after selecting '**More Detailed Benefit Gains**' (see below).

Welfare Benefit Outcomes

	Enter Y if applicable	
General Benefit Gain		
Hide More Detailed Benefit Gains		

Client/Partner Benefits

Show Disability Benefits	
Show Housing/Council Tax Benefits	
Show Pension Credit/Income Support	
Show Carer's Benefit	
Show Retirement Pension	
Show Winter Fuel Allowance	
Show Working Age Benefits	
Show Social Fund Benefits	
Show Health Cost Benefits	
Show Bereavement Benefits	

External Carer's Benefits

Hide External Carers Benefits	
All External Carers Benefits	

Benefit	Claim Type	Weekly Amount	Annual Amount (£52)	Backdated Award	Information Status
Carers Allowance (new claim only)		0.00	0.00		
Carers Allowance Backdated				0.00	
Income Support/Pension Credit		0.00	0.00		
Income Support/Pension Credit Backdated				0.00	
Housing Benefit		0.00	0.00		
Housing Benefit Backdated				0.00	
Council Tax Benefit		0.00	0.00		
Council Tax Benefit Backdated				0.00	
Other		0.00	0.00		

By doing this the Practical Gains Results Sheet will be able to provide you with statistics specifically related to external carers.

Using the Practical Gains Results Sheet

The Practical Gains Results Sheet enables you to transfer in the data from the individual Practical Gains Recording Sheets and provides statistics about the practical gains that your I&A service has achieved for your clients by month and also for the year to date.

Importing data into the Practical Gains Results Sheet

Getting started

THIS NEXT STEP IS VERY IMPORTANT: When you first open the Practical Gains Results Sheet you should immediately save it with a new name, for example 'practical gains 2010 & 2011'. This is because the spreadsheet automatically saves every time you enter any data so unless you save the sheet with a new name immediately you will lose your master version of the spreadsheet.

Next you should enter the correct period that you will be gathering data for (NB the Practical Gains Recording Sheet will let you collect one year's data and the year can start in any month that you wish) and also the name of your Age UK.

The screenshot shows the 'Practical Gains Results' form. At the top, there is a text box labeled 'Practical Gains Results:' containing '2010/2011'. A red box highlights this text, and a callout bubble points to it with the text 'Enter Year in the format YYYYYY'. To the right of this is the 'ageUK' logo. Below the year box is a text box labeled 'Age UK.....' which is also highlighted with a red box. A callout bubble points to it with the text 'Enter Age UK name into the box on the left'. Below these are two main sections. The left section is a yellow box containing a dropdown menu labeled 'Select the month that the data from the form you are importing should be added to' with 'Dec' selected. Below this is a button 'Import Practical Gains Recording Sheet'. Further down is another dropdown menu labeled 'Select a month to view the Client IDs for the forms that have been imported.' with a button 'Show Client IDs' below it. The right section is a large yellow box with the word 'December' at the top.

How to import data

To import the data for a client you must first select the month that you wish to import the data into from the drop down menu:

Practical Gains Results: 2010/2011

Enter Year in the format YYYYYY

ageUK

Age UK.....

Enter Age UK name into the box on the left

Select the month that the data from the form you are importing should be added to

Dec

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

Show Client IDs

December

Then click on the 'Import Practical Gains Recording Sheet' button:

Practical Gains Results: 2010/2011

Enter Year in the format YYYYYY

ageUK

Age UK ANYTOWN

Enter Age UK name into the box on the left

Select the month that the data from the form you are importing should be added to

Dec

Import Practical Gains Recording Sheet

Select a month to view the Client IDs for the forms that have been imported.

Show Client IDs

December

When you do this a warning message will pop up saying 'Choose the practical gains form that you would like to import. Is the Excel workbook closed? Yes / No'. If you have any Practical Gains Recording Sheets open you should click 'No' and close them before proceeding. Otherwise click 'Yes'. This will then open up a window in which you will have access to your 'My Documents' folder. If you have saved the Practical Gains Recording Sheets elsewhere select 'My Computer' from the left-hand column of the box to be able to locate them. Find the Practical Gains Recording Sheet that you wish to import (hopefully now you can see why we recommended that you save your documents in the suggested manner) and either double click on the document or click on the 'Open' button in the bottom right-hand corner of the box. The data will then be imported into the Practical Gains Reporting Sheet. This can take a few seconds and **we recommend that you use a newer or more powerful PC for importing the data to speed the process up**. Once the data has been imported you will see that details of the client will appear in the column on the right-hand side of the screen:

Practical Gains Results: 2010/2011

the format
YYYYYY

ageUK

Age UK ANYTOWN

Enter Age UK name into the box on the left

Select the month that the data from the form you are importing should be added to

Dec

Import Practical Gains Recording Sheet

Select a month to view the Client IDs for the forms that have been imported.

Show Client IDs

December

1 - A Smith

You can view the client IDs of clients that have already been entered into the spreadsheet for any particular month by firstly selecting the appropriate month from the drop down menu and then clicking on the 'Show Client IDs' button. The full list of client will appear in the column on the right-hand side of the screen:

Practical Gains Results: 2010/2011

the format
YYYYYY

ageUK

Age UK ANYTOWN

Enter Age UK name into the box on the left

Select the month that the data from the form you are importing should be added to

Dec

May
Jun
Jul
Aug
Sep
Oct
Nov
Dec

Import Practical Gains Recording Sheet

Select a month to view the Client IDs for the forms that have been imported.

Show Client IDs

December

1 - A Smith

Viewing the results

The statistical results for practical gains achieved in a single month or so far in the year can be accessed by selecting the appropriate work book at the bottom of the page:

Front Sheet	Monthly Rpt Welfare Bens	Monthly Rpt Other Money	Monthly Rpt Other Gains	Running Total Rpt - Welfare Bens	Running Total Rpt - Other Money	Running Total Rpt - Other Gains
-------------	--------------------------	-------------------------	-------------------------	----------------------------------	---------------------------------	---------------------------------

For both Monthly and Running Total the results are split into three pages. The first page includes headline money statistics and all welfare benefit gain statistics. The second page has statistics on all other monetary gains. And the final page includes statistics on housing, health and social care and access to services and consumer issues.

When wishing to view the results for a specific month you must firstly go to the 'Monthly Rpt Welfare Bens' page and select the month from the drop down menu at the top of the page:

Number of Claimants per Benefit

Average Benefit per Claimant

View Claims

Value of Changes of Circumstances

Claimants with a Change of Circumstance

Backdated Awards

Other Welfare Benefit Gains

April

April
 May
 June
 July
 August
 September
 October
 November

Choose a month from the dropdown list on the left

Welfare Benefit Gains Only			
	Total Value	Confirmed	Estimated
Positive Benefit Gains			
Total amount of positive benefit claimed by all clients (new claims and increases BUT NOT backdated awards)	0.00		
Total amount of positive AA Benefit	0.00	0.00	0.00
Total amount of positive DLA Care Benefit	0.00	0.00	0.00
Total amount of positive DLA Mobility Benefit	0.00	0.00	0.00
Total amount of positive DLA PIP Benefit	0.00	0.00	0.00

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This will then be the relevant month for all monthly data being shown by the spreadsheet and will appear at the top of all relevant pages. To see data for another month you need to return to the 'Monthly Rpt Welfare Bens' page and change the month.

You can use the menu on the left of the pages to navigate to different parts of the page. Selecting [Back](#) will return you to the top of the page:

April

[Debt Outcomes](#)
[Grant & Payment Outcomes](#)
[Taxation Outcomes](#)
[Financial Products/Services](#)

Back

Other Money Gains			
	Total Number		
Non Welfare Benefit Gains			
Total Number of None Welfare Benefits Money practical gains	0		
Total number of Debt practical gains	0		
Total number of Grants and Payments practical gains	0		
Total number of Taxation practical gains	0		
Total number of Financial Products and Services practical gains	0		
Total number of clients receiving None Welfare Benefits Money related appropriate information/advice	0		
Debt Outcomes	Total Number		One Off Payments/Write Off
General Debt Gain	0		
Debt Rescheduled	0		
Debt reduced, waived or written off (Amount)	0		0.00
Debts repaid	0		
Debt - Court action avoided	0		
Debt - Bailiff's action prevented	0		
Other debt practical gain	0		
Nature of other debt practical gain			

Further explanation of some of the statistics can be found in the [NOTES](#) page. The notes page can be accessed by selecting the [NOTES buttons](#) on the right of the page:

Money & Benefits

All Money and Benefit Gains			
	Total Value		
Total financial value of Money and Benefit Gains	0.00		
Total value of Actual Financial gains	0.00		
Total value of Reimbursement	0.00		
Total financial value of other gains	0.00		
Total Value of Grants	0.00		
Total Value of Grants, Loans and Concessions claimed to pay for services activities or	0.00		
Total value of debts/fines/fees/arrears written off	0.00		

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This will take you to the relevant section of the 'Guidance Notes' page, as can be seen below. Here you will find further explanation of the relevant aspect of the spreadsheet. By clicking on the [BACK TO MONTHLY REPORT](#) or [BACK TO RUNNING TOTALS REPORT](#) marker next to the relevant guidance you will be returned to the report page you were looking at.

Total Value Actual Financial Gains - This figure includes any gain where a client has actually received additional money or seen a reduction in their income, for example welfare benefit payments, grants, compensation or saving on a bill.	To return to the report screen click	BACK TO MONTHLY REPORT
Total Value of Reimbursements - This figure includes any gain where a client has been reimbursed, for example receiving a tax rebate, being repaid an overpayment or receiving a refund.	To return to the report screen click	BACK TO MONTHLY REPORT
Total Financial Value of Other Gains - This figure includes any gain where the client hasn't actually received additional money but the gain has a financial value, for example debts/fines/fees/arrears that have been written off or the value of a warmfront grant.	To return to the report screen click	BACK TO MONTHLY REPORT
Total amount of positive benefit claimed by all clients - This figure includes all clients i.e. the initial client, their partner and any external carer. The specific figures for client/partner and external carers are provided below the breakdown by individual benefit.	To return to the report screen click	BACK TO MONTHLY REPORT
Confirmed and Estimated Amounts - These columns break down the amounts by whether the amount has been confirmed by either the client or the processing agency or is an estimate of the amount of benefit that will be received.	To return to the report screen click	BACK TO MONTHLY REPORT
Total Number of Claimants (all clients) - This figure includes all clients i.e. the initial client, their partner and any external carer. The specific figures for client/partner and external carers are provided below the breakdown by individual benefit.	To return to the report screen click	BACK TO MONTHLY REPORT
Total Amount of New Claim Benefit Claimed - This figure includes all clients i.e. the initial client, their partner and any external carer. The specific figures for client/partner and external carers are provided below the breakdown by individual benefit.	To return to the report screen click	BACK TO MONTHLY REPORT
Total Value of Change of Circumstances - All of the amounts in this table are the total monetary value of changes of circumstances whether they were either an increase or a decrease in benefit. NB the decreases are not taken from the increases, so if one client has an increase of £20 in a benefit and another client has a decrease of £20 in the same benefit, the total will be £40. These amounts are being calculated as a means of quantifying the work undertaken to deal with changes of circumstances. This is work that can often be more complicated and time consuming than that which benefit take up work but, especially with regards to reductions in benefit, this work is often not captured in reporting.	To return to the report screen click	BACK TO MONTHLY REPORT

Saving the Spreadsheet

There is no need to save the spreadsheet as this happens automatically after each piece of data you import.

Which month to input a client's practical gains data into?

It is entirely up to you which month you input a client's practical gains data into but there are two common approaches and which you use will often depend on issues such as funder requirements. You can either capture data in the month that a client's case was opened or the month in which you close the client's case.