

Ref	Waverley Scrutiny Group recommendation	Accepted	Waverley Borough Council comment	Lead Officer	Deadline
1.	<p>To review and revise the recharge policy and process in line with our report identifying recommendations which we have raised in this report. Ensuring the RCO (Recharges and Collections Officer) and reporting manager are solely responsible in making decisions regarding the recharge process.</p> <p>Ensure recharging policy and process acknowledges, and includes, out of hours, duty of care and securing properties.</p>	Accepted	<p>A review and update of the recharge policy and process has been undertaken. This is awaiting approval by the appropriate Manager.</p> <p>When finalised, the recharge policy and procedure will be sent to all teams within the Housing Service. It will be accompanied by a briefing note to remind all team members that the RCO and Rent Accounts Manager are solely responsible for making decisions on the recharge process.</p>	Recharge and Collections Officer	Policy reviewed and will be reported at July O & S
			Policy and process completed and agreed by Rent Accounts manager and Head of Housing Operations. To be considered at June Housing O&S		Completed
2.	Any queries from a customer about a recharge invoice, is to be passed to the RCO or their manager and not to be answered by the person taking the call.	Accepted	Central notes should be available on Orchard for any officer to answer simple enquiries. However queries regarding waivers or disputes should be passed to the RCO or Rent Accounts Manager.	Recharge and Collections Officer	June 2018
			Update process documents to reflect escalation.		Completed

3.	A separate recharge cost code is set up.	Accepted	There has been discussion with the Council's Finance team who have advised separate expense codes can be created. This will be to enable expenditure on jobs that are to be recharged, to be separately monitored.	Recharge and Collections Officer / Accountant Manager	June 2018
			Separate expense codes have been created	Completed	
4.	IT system for the void recharges needs to be addressed as a matter of urgency. Including additional event(s) for Void recharges on Project 20 and for Orchard to set up a sub-account.	Accepted	See response to recommendation 3 that a separate recharge cost code is set up. Also to be incorporated in the review of the termination of tenancy and void process.	Recharges and Collections Officer/ Interim Special Projects Manager	June 2018
			See response to recommendation 3	Completed	
5.	No "ball park" figures, estimates or quotations are to be given to customers over the cost of work to be recharged, should be made by the Customer Services Team or contractors. If a cost figure is provided it must be qualified by stipulating this figure could be higher or lower once the repair has been completed.	Accepted	See response to recommendation 1. This is incorporated in the review of the revised recharge policy and process. A frequently used recharge list to be developed and published to give customers an idea of estimated costs with qualification that this figure could be higher or lower once the repair has been completed. List to be reviewed quarterly.	Recharges and Collections Officer/Website Manager	June 2018 September 2018 December 2018 (Quarterly review dates)
			A frequently used recharge list has been developed and leaflet with Communications for design	Practically complete	

6.	Clear instruction to be given to anyone responsible for identifying a recharge, on the process required to ensure the RCO and/or their manager are fully aware of all recharge orders being raised. The Void Inspector/Co-ordinator should ensure that all recharge orders are raised correctly and passed to the RCO and/or the manager. With the Void Co-ordinator checking weekly that all recharges have been raised and passed to the RCO.	Accepted	See responses to recommendations 1 and 3.	Recharges and Collections Officer/ Void Team Manager	June 2018
			See responses to recommendations 1 and 3	Completed	
7.	All Tenancy and Estates Officers are to fully comply with procedures for informing and inviting the RCO to pre termination visits. Officers should inform the RCO and Void Inspector if Recharges will be required, clearly stating what the recharge is for.	Accepted	The RCO or T&E Officer will attend EOT visits (pre-termination of tenancy visits). The majority of tenants will not incur a recharge. The EOT visit form will be developed to contain a section where possible re-charges can be recorded. The forms will be scanned and an email sent to Property Services (inc. voids team), Homechoice (allocate void properties to Housing Register applicants) and the Council's repairs contractor to confirm this documentation has been uploaded on to our records.	Recharges and Collections Officer/T&E Team Leader	July 2018
			RCO training T&E team	In progress	

8.	IT system for raising invoices on Agresso needs to be addressed.	Accepted	<p>The Council is looking into the functionality of Agresso (Council's core financial system used for invoice payments) to raise recharge invoices.</p> <p>To resolve challenges with Agresso, invoices will be raised through Orchard to meet the requirements of the policy. Leaseholders will continue to be invoiced via Agresso.</p>	Recharges and Collections Officer/Projects Manager Housing Support	July 2018
			Testing invoice process within Agresso	In progress	
9.	Reports to be re-examined and to provide detailed and verifiable information.	Accepted	<p>Headline reports are already produced. Officers are developing a full breakdown report which will identify reasons for recharge and action taken.</p>	Recharges and Collections Officer/Projects Manager Housing Support	July 2018
			Reports in development and testing	In progress	
10.	Reports required on complaints with reasons for waiving a charge.	Accepted	The Corporate Complaints system will be utilised to monitor recharge complaints.	Recharge and Collections Officer	Ongoing
			Reports available	Completed	
11.	Where a full payment plan is put in place within 14 days no 15% administration charge is added to the invoice.	Accepted	<p>There is no administration charge for invoices paid within 14 days as stated within the policy.</p> <p>Ensure policy review reflects this recommendation.</p>	Recharge and Collections Officer	April 2018
			Policy update accordingly	Completed	

12.	For the Service Improvement Team and RCO to explore the capabilities of Orchard regarding Recharges for greater customer service and efficient reporting. More advertising of the recharges i.e. posters in all Senior Living units, Council Offices and communal centres. Continual articles in any WBC publications e.g. Waverley Homes and People and in Tenants newsletters. Phone numbers to be included along with web site addresses.	Accepted	There will be publicity in the form of a leaflet and posters promoting the recharge process. Actively encourage tenants to take out appropriate contents insurance at sign up.	Recharge and Collections Officer/T&E Team Leader/Service Improvement Manager	July 2018
			Relates to recommendation 5	In progress	
13	Greater encouragement for tenants to take up home insurance.	Accepted	See response to recommendation 12. Stronger focus on tenants taking up home insurance at sign up.	Recharge and Collections Officer/T&E Team Leader	June 2018
			T&E team discuss home insurance at new tenant interviews	Completed	
14	On pre-termination visits all work identified as being rechargeable to be either carried out by the tenant or WBC, should be recorded on site and signed by both tenant and WBC Officer and a copy left with the tenant.	Accepted	See response to recommendation 7. The EOT visit form will be developed to contain a section where possible re-charges can be recorded. This form will be signed by the outgoing tenant.	Recharge and Collections Officer	July 2018
			Relates to recommendation 7	In progress	