

Case Study: Human Factor Client Z

The client is a 66-year-old pensioner from Poland who was referred to the Human Factor (Digital Support) service for assistance with setting up the NHS App and managing his pension accounts online. During the initial engagement, it became clear that he had limited confidence using digital platforms. He often experienced difficulties logging in, updating personal information, and navigating online services independently. As a result, he required one-to-one guidance to complete several important digital tasks.

One of the first areas of support focused on introducing the client to the NHS App and explaining its benefits. The support worker helped him download the app onto his phone and guided him through the login process. They also demonstrated how he could use the app to access his health information and book medical appointments.

The client also needed assistance submitting his State Pension application online. With support, the application was successfully completed and submitted, ensuring that he did not miss out on an important entitlement. At a later appointment, the client informed the support worker that he had received a decision regarding his State Pension. This allowed the worker to continue supporting him with the next steps in managing his retirement income.

Shortly afterwards, the client required help completing an application for Pension Credit. The support worker assisted him with submitting the form online. However, the client was later informed that his application had been refused, which meant he required further guidance on alternative financial options.

In addition, the client experienced difficulties accessing his private pension account. When the support worker contacted the pension provider, they discovered that the client's email address and phone number had not been added to his profile, preventing him from creating an online account. After updating these details, the client was advised that he would be able to create an online account once the changes had been processed. A follow-up appointment was arranged to complete the setup.

During a later session, the support worker contacted the pension provider again to confirm whether the client could make personal contributions to his existing pension pot. The provider confirmed that this was possible. The client also asked how he could withdraw a lump sum from his pension, but this option was not available through his online account. The support worker therefore requested that the provider send the necessary withdrawal form to the client's home address in case he needed to access the funds.

Throughout the support period, the client became more informed about how he can access the NHS App and pension options. He gradually became more confident using online services. With consistent one-to-one guidance, he successfully completed his State Pension application, submitted a Pension Credit application, updated his private pension account details, and gained a clearer understanding of how to access or contribute to his pension savings.