

# Migration Notice Helpline –

Specialist teams guidance

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**Note:** This section must **only** be used by the agents working on Move to Universal Credit (managed migration).

## Introduction

Move to Universal Credit is a project made up of 3 ways that someone can end their legacy benefit claim and start claiming Universal Credit. These are:

- Natural migration
- Voluntary migration
- Managed migration

### **Natural migration (on-going)**

Natural migration is where a legacy benefit claimant has a change in circumstances which would have previously resulted in them needing to make a new claim for one of the benefits that Universal Credit replaces.

So instead of making a new claim to Jobseeker's Allowance (Income Based), Employment and Support Allowance (Income Related), Income Support, Housing Benefit or Tax Credits, they will need to make a claim to Universal Credit.

There are many changes which can result in a new claim to benefit being required, such as a change in employment status, health or family circumstances.

### **Voluntary migration (on-going)**

Voluntary migration is where a claimant voluntarily makes a claim to Universal Credit and:

- they have not received a migration notice directing them to make a claim to Universal Credit as part of managed migration
- they have not had a change of circumstances leading to them naturally migrating to Universal Credit

### **Managed migration**

Move to Universal Credit (managed migration) is a process designed to close down legacy benefits and direct claimants to make a claim to Universal Credit. Claimants selected to claim Universal Credit as part of Move to Universal Credit (managed migration) will receive a **migration notice** in the post.

This is a notification which explains their legacy benefit claim will be ending, and directs them to make a Universal Credit claim by a specific date. This will be 3 months and one day from the date of issue.

For example, if the Migration Notice is issued on 25 May, the claim by date is the 26 August.

If they claim by the claim by date, they will be considered for Transitional Protection. This protects eligibility and entitlement from existing benefits. If the claimant makes a claim within one assessment period of their claim by date, they will still be considered for Transitional Protection.

Their Universal Credit claim start date will be backdated to their deadline date.

Only claimants on the Move to Universal Credit (managed migration) journey are eligible to be considered for Transitional Protection.

Once their claim to Universal Credit has been made, their legacy benefits will be stopped.

Claimants who have made a Universal Credit claim as part of the Move to Universal Credit (managed migration) programme are those who have not yet had a change of circumstances that have required them to claim Universal Credit nor chosen to make a Universal Credit claim voluntarily. For this reason, they are still claiming legacy benefits.

Universal Credit replaces the following legacy benefits:

- Child Tax Credit (CTC)
- Working Tax Credit (WTC)
- Housing Benefit (HB)
- Income Support (IS)
- income-based Jobseeker's Allowance (JSA IB)
- income-related Employment and Support Allowance (ESA IR)

## Eligibility for Move to Universal Credit (managed migration)

In most cases, those claiming Universal Credit as part of Move to Universal Credit (managed migration) must meet the normal eligibility criteria.

See: **Eligibility for Universal Credit**

However, there are some exceptions to the eligibility criteria for these claimants.

These exceptions are part of Transitional Protection, and only apply if claimants apply on or before the claim by date on their migration notice.

### Exception: Students

Full time students are not usually eligible to receive Universal Credit. However, legacy benefit claimants who are making a claim as part of Move to Universal Credit (managed migration) and are already in full time education, are exempt from this rule.

They will be allowed to complete any course they were participating in, on the day before they made their claim.

If their claim to Universal Credit is closed and they are still a student when their course ends and they try to claim again, the normal student eligibility rules are applied. The only exception to this is if their claim is closed due to earnings. In these cases, if a further Universal Credit claim is made within 4 months of the last day of their previous entitlement, the student disregard can be applied.

If they are no longer a student when the course ends, normal Universal Credit rules apply.

If they start a new course of education after they make their claim, the normal Universal Credit student eligibility rules must be applied. See **Students: Eligibility, conditionality and student income**

### Exception: Tax Credit only claimants with capital over £16,000

Tax Credit only claimants who have more than £16,000 of capital or savings, and meet all other eligibility criteria are able to be entitled to Universal Credit for a maximum 12 assessment periods.

This exception does not apply to any other benefit or combination of benefits.

Capital or savings above £6,000 and up to £16,000 will be subject to the normal **treatment of capital**.

Any capital or savings above £16,000 is disregarded. (For example, if the claimant has £20,000, the amount from above £6,000 up to £16,000 is taken into account and the additional £4,000 is disregarded).

If their capital or savings falls to £16,000 or below, then increases above £16,000 within the 12 assessment periods, the disregard is not reapplied.

If their capital or savings remains above £16,000 after the 12 assessment periods have passed, they will no longer be eligible for Universal Credit.

If their capital or savings reduces significantly below £16,000, **deprivation of capital** will need to be considered.

If their claim is closed due to earnings before the 12 assessment periods pass, and they re-claim within 4 months of the end of the assessment period for which Universal Credit was awarded, the exception to the £16,000 rule continues until they reach 12 total assessment periods on their Universal Credit claim.

The total number of assessment periods does not reset if a new claim is made. For example: if the claimant spends 8 assessment periods on Universal Credit

- their claim closes due to earnings
- they re-claim within 4 months of the end of the assessment period for which Universal Credit was last awarded,
- they are able to spend another 4 months on Universal Credit with capital in excess of £16,000.

If claim closure due to earnings coincides with the claimant reaching 12 assessment periods, the exception to the £16,000 rule will not apply if they re-claim.

## Migration notice

Claimants selected to claim Universal Credit through the Move to Universal Credit (managed migration) Programme will receive a migration notice by post. The migration notice is a notification letter which tells the claimant that their legacy benefits will be ending, and that they need to make a Universal Credit claim by a specific date. This will be a minimum of 3 months and one day from the date the migration notice is issued.

For example, if a migration notice is issued on 10th May, the claimant needs 3 months including 10th May to make their Universal Credit claim. They must be given until 10th August at least to make their claim. The 11th August (or later

date) should be specified as the claim by date, to ensure the deadline is not within the 3 month and one day period.

Once the migration notice is issued an alert will be set in Universal Credit, to inform agents once a claim to Universal Credit has been made.

## Change of circumstances after the migration notice is issued

Once the migration notice is issued, if the claimant has a change of circumstances within the 3 month and one day period, that moves them into an exclusion or deferral category, they may be issued a cancellation notice.

See **Move to Universal Credit (managed migration): Exclusions and deferrals**

They can be brought back on to the Move to Universal Credit (managed migration) journey if their circumstances change again, unless the change means that they are no longer entitled to legacy benefits.

A claimant may have a change of circumstances which means that:

- they are no longer entitled to legacy benefits and need to claim Universal Credit straight away
- they would have previously had to make a claim to a different legacy benefit that Universal Credit has replaced

These claimants need to make a Universal Credit claim straight away to ensure that they can receive the correct financial support.

Claimants who receive a migration notice and subsequently have any change of circumstance, including a change in couple status, will be eligible for the other Transitional Protection arrangements for students and for disregarding capital.

Claimants who move to a non-Move to Universal Credit (managed migration) postcode, after the migration notice has been issued are still considered to be Move to Universal Credit (managed migration) claimants.

This includes claimants who have not yet made their claim to Universal Credit.

They should continue on the Move to UC (managed migration) claimant journey, and be considered for Transitional Protection in the same way as other Move to Universal Credit claimants.

If the claimant does not make a claim by the claim by date on their migration notice, their legacy benefits will be terminated.

## Sending a reminder

All claimants selected to take part in Move to Universal Credit (managed migration), receive a migration notice directing them to claim Universal Credit by a specific date.

Where an individual has not made a claim 7 weeks after receiving their migration notice, a reminder notice letter will be issued.

The reminder notice re-emphasises the requirement to make a claim by their claim by date, the implications of not making a claim, and the support available to them.

If the individual does not make a claim 10 weeks after the migration notice was issued, a second reminder notice is issued by SMS text if there is a mobile number held as a primary number.

If there isn't a primary number, the claimant is sent a reminder letter.

## Claim made to Universal Credit

If a claimant makes a new Universal Credit claim by the claim by date, the following benefits will continue to be paid for a further 2 weeks, after the claim to Universal Credit was made from the day they made their Universal Credit claim.

- Income Support
- Jobseekers Allowance (IB)
- Employment and Support Allowance (IR)
- Housing Benefit

These will not be deducted from future Universal Credit payments.

However, Working Tax Credits and Child Tax Credits eligibility will stop from the day before they made their Universal Credit claim.

Claimants in temporary or specified accommodation will continue to receive Housing Benefit.

If the claimant has a current WCA decision recorded on their ESA claim, this will automatically be carried over to their Universal Credit claim. They will not need to attend another WCA assessment. Universal Credit WCA review processes will apply.

If a claimant states they need extra help with rent or housing costs and require further financial support, they should be referred to their Local Authority to apply for a **Discretionary Housing Payment**.

Once the National Insurance Number and claimant identification are verified, a banner will be visible within the service to identify claimants who are claiming under Move to Universal Credit.

The Transitional Element can be calculated once all evidence has been verified. See Transitional Protection (add link to guidance)

Claimants will be assigned to a Labour Market regime appropriate to their personal circumstances and be expected to participate in appointments and work-related activity if their regime requires this. See: **Labour Market regimes**

## Claimant does not make a claim to Universal Credit

Claimants who do not make a claim by the claim by date will have their legacy benefits stopped.

However, if they make a Universal Credit claim within one assessment period of that happening, their Universal Credit claim date will be backdated to the claim by date. These claimants can still be eligible for Transitional Protection, if applicable, and the 2 week run on.

The 2 week run on is payable even if the claimant makes a claim to Universal Credit after their claim by date, or they don't claim at all.

For some claimants, a migration notice extension may be appropriate. Once all the reminders have been issued, if the claimant does not make a claim by their claim by date, no further attempts to contact the claimant are made before their legacy benefits are terminated.

## Extensions

It may sometimes be appropriate to extend a claimant's claim by date.

A maximum of 4 weeks can be applied, either by the claimant requesting it, or where a support decision is made based on their circumstances.

There are a number of good reasons a claimant might need more time to claim, including:

- the claimant did not engage in the Move to Universal Credit process until their claim by date was already very close
- the claimant needs more time to get the necessary documentation, evidence or information to make their claim
- the claimant needs more time to get support with making their claim
- the claimant has planned hospital treatment (or a similar commitment) that means they are unable to make a claim by their deadline date

This list is not exhaustive.

If the claimant is still struggling to make a claim by the end of their extension period, they can request a further extension. This must be done more than 1 week before their claim by date to discuss their options.

There is no limit to the number of times an extension can be requested or allowed.

Extensions can only be applied before the claimant's claim by date.

Once the date has passed, an extension cannot be applied.

If it is clear the claimant can make and maintain a claim by online self-service, but needs support to do so, this is typically linked to skills, confidence, lack of motivation and access, see **Assisted Digital** support or **Help to Claim**.

If the claimant is unable to make and maintain an online claim, there are exceptional circumstances where they can make a claim by phone.

See: **Spotlight on: Claims by phone**.

## Claimant fails to provide evidence for their Universal Credit claim

Once a Universal Credit claim has been made, information and /or evidence is needed to verify certain aspects of it, such as claimant identity and details of housing / rent payments. These are Business As Usual processes.

If the claimant fails to provide the information required to complete their claim within a month of that information being requested, the claim would be closed.

## Self-employed claimants: Minimum Income Floor exemption

Self-employed claimants that claim Universal Credit, as part of Move to Universal Credit (managed migration) and are **gainfully self-employed** (GSE), will enter the 12 month start-up period.

They will not have the **Minimum Income Floor** (MIF) applied to their Universal Credit award until this period has ended. This is regardless of how long they have been self-employed before moving to Universal Credit.

After 12 months Business as Usual will apply.

# Move to Universal Credit (managed migration): Exclusions and deferrals

## Background

Some claimants will not be able to take part in the initial Move to Universal Credit (managed migration) programme due to their personal circumstances.

This may be because:

- they would not meet the normal eligibility conditions for Universal Credit
- it would be unreasonable to expect them to make a claim at this time
- their circumstances temporarily mean that DWP cannot safely move them across from their legacy benefits

Some claimants may be currently excluded from participating in Move to Universal Credit (managed migration), whereas others may have their participation deferred.

It may be identified that a claimant falls into one of the exclusion or deferral categories at different points in the Move to Universal Credit (managed migration) journey. This could be:

- before the migration notice is issued
- after the migration notice is issued but before they make a claim
- after they make a claim to Universal Credit

Depending on when this is identified, the support provided to claimants will differ.

## Exclusions

In certain circumstances, claimants will not be included in the Move to Universal Credit (managed migration) programme. These are claimants who are:

- currently in prison
- in receipt of a Tax Credits nil award and have no other existing benefits in payment
- within 6 months of State Pension age
- in receipt of Housing Benefit only and are living in specified or temporary accommodation
- a joint tax credit claimant and their partner has been imprisoned in a member state
- receiving a Tax Credit supplement
- living abroad and receiving a DWP benefit that allows them to claim Child Tax Credits



- Posted Workers (work for a UK company in an EU country)
- Zambrano Carers (a non-EEA national who is the primary carer of a British Citizen child that lives in Great Britain, and the child would not be able to live in GB without their primary carer)

Claimants with any of these circumstances will be permanently excluded from this move to Universal Credit.

## Deferrals

In certain circumstances claimants may be deferred from being invited to the Move to Universal Credit (managed migration) programme.

Group	Defer until:
Couples	It is decided that couples are on the journey
<p>Housing Benefit claimants only</p> <p>Claimants aged 16 or 17 years old, who are claiming in their own right or as part of a couple claim</p>	<p>We can identify if they have a partner in the data that is shared with DWP.</p> <p>Their 18th birthday</p>
<p>Fraud / DWP compliance cases being investigated.</p> <p>HMRC and DWP Special Customer Records</p> <p>Employment and Support Allowance claimants in the assessment phase who have never had the outcome of the work capability assessment.</p> <p>ESA and JSA claimants with a nil award</p>	<p>The fraud / DWP compliance investigation is complete.</p> <p>They can be accommodated safely in the process.</p> <p>The Work Capability Assessment outcome has been applied to their legacy benefit.</p> <p>A process is designed to include them.</p>

Group	Defer until:
Claimants whose mail has been returned as they are no longer living at the address it was sent to (Dead Letter Office)	Their correct address can be established.
Claimants with a child in non-advanced education who are aged 19	The child reaches 20.
Claimants with a visual impairment	The migration notice is designed to be issued in braille and large print.
Claimants who require a home visit	A process is designed for claimants on the Move to Universal Credit journey to have a home appointment.
Claimants who have an appointee	A process is designed to include them.
There is a mismatch between the data held on the 'Track Move to UC migration' database and the data held on CIS (Searchlight)	The data can be reviewed and corrected where needed.
Terminally ill claimants	A process is designed to include them, if that is appropriate in their circumstances.

# Move to Universal Credit (managed migration): Migration notice helpline lines to take

This product has been created to support agents on the dedicated Move to Universal Credit (managed migration) telephony line.

The product contains questions that claimants may ask about their transition from legacy benefits onto Universal Credit, and the corresponding agent lines to take / actions.

This product must not be used to support those claiming as part of natural or voluntary migration. For more information, see **Move to Universal Credit (managed migration)**.

Identifying if a claimant is part of Move to Universal Credit (managed migration)

How do I determine if a claimant is part of Move to Universal Credit managed migration?

To check if a claimant is part of Move to Universal Credit (managed migration), ask the claimant if they have received a letter from DWP telling them they need to make a claim to Universal Credit by a specific date.

Ask if at the bottom of each page of the letter states:

'This is a migration notice issued under regulation 44 of the Universal Credit (Transitional Provisions) Regulations 2014'.

For information on taking action when a claimant has not received a migration notice, see: **Claimant has not received a migration notice**.

If the claimant is not part of the current roll out, explain that they have called the wrong number.

Depending on their reason for making contact, give them the National Service telephony number: [REDACTED] or the Tax Credits number: [REDACTED]

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Telephone ID check and explicit consent

How do I complete a telephone ID check for a Move to Universal Credit (managed migration) claimant?

If the claimant has already made a claim to Universal Credit, follow the telephone ID check process on the Universal Credit service as normal. For more information on claimant contact after a claim has been made, see: **Claimant makes contact after making their claim to Universal Credit.**

If the claimant has not made their Universal Credit claim yet, take the following action:

Access the 'Track Move to UC migration' spreadsheet.

Ask the claimant:

- What is the reference number on your migration notice? (The number on the right-hand side of the letter next to 'Your ref:')

Claimant provides a reference number that can be found on the spreadsheet

The answers the claimant gives to the following questions must be compared to the information held on the spreadsheet.

Ask the claimant:

- What is your full name?

Ask the claimant 1 of the following:

- What is your date of birth?
- What is the first line of your address and your post code?

Important: If the claimant's address on the spreadsheet is highlighted in red, this means they have previously reported a change of address. In these cases, you must use the details held in the 'New address' and 'New post code' columns of the spreadsheet to complete the telephone ID check.

Claimant has lost or misplaced their migration notice and does not know their migration notice reference number

The answers the claimant gives to the following questions must be compared to the information held on the spreadsheet.

Ask the claimant:

- What is your full name?

Ask the claimant 1 of the following:

- What is your date of birth?
- What is the first line of your address and your post code?

Important: If the claimant's address on the spreadsheet is highlighted in red, this means they have previously reported a change of address. In these cases, you must use the details held in the 'New address' and 'New post code' columns of the spreadsheet to complete the telephone ID check.

Finally, ask the claimant:

- Which of the following benefits are you currently receiving?
  - Jobseeker's Allowance (Income-based)
  - Employment and Support Allowance (Income-based)
  - Income Support
  - Housing Benefit
  - Child Tax Credits
  - Working Tax Credits

How do I record explicit consent for a Move to Universal Credit (managed migration) claimant?

If a claimant provides explicit consent for a representative to speak on the telephone following the ID check, this must be recorded in the 'Contact history' section of the 'Track Move to UC migration' spreadsheet.

For more information on explicit consent, see: **Consent and disclosure including when to share with third parties.**

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Migration notice

Is the Migration Notice letter I received from Universal Credit genuine?

- ask the claimant to provide the reference number on their migration notice. This will appear next to 'Your ref' on the right hand side of their letter
- access the managed migration spreadsheet
- hold the 'ctrl' and 'f' keys on the keyboard
- type the claimant's reference number into the free text box that appears

Claimant's reference number does not exist on the spreadsheet

If the reference number is not found, check the claimant's details against the spreadsheet to look for a match.

If a match is not found, the claimant has not been selected for Move to Universal Credit (managed migration) at this stage.

You must tell the claimant to ignore the letter as it has not been sent from DWP, and may be a scam.

Claimant's reference number exists on the spreadsheet

- check the 'Migration notice sent' column on the spreadsheet

If the column has been completed with a 'Yes', this means the claimant has been sent a migration notice.

You must:

- tell the claimant the migration notice is genuine, and they need to follow the instructions within the letter to make a claim to Universal Credit before the claim by date stated on the letter

If the column is blank, the claimant has not been sent a migration notice.

You must:

- tell the claimant to ignore the letter as it has not been sent from DWP and may be a scam

What happens if I don't make my claim before the deadline date on the migration notice?

If you don't make a claim before the date stated in your migration notice letter, your legacy benefits will close, and your payments will stop.

Additional information and support is available at the **Managed move of claimants to Universal Credit set to restart: GOV.UK(link is external)**. You can always make a claim to Universal Credit regardless of the claim by date, but after that date your legacy payments will stop.

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Claimant has not received a migration notice

I've heard Move to Universal Credit mentioned in the media, does this impact me?

You do not have to do anything until you receive a letter from DWP requiring you to claim Universal Credit.

However, if you want to learn more about Universal Credit you can find further information at **Understanding Universal Credit.gov.uk(link is external)(link is external)**.

I know someone who has received a letter, but I haven't. Why is this?

We have issued letters to a small number of customers and will be steadily increasing those numbers over time.

Unless you receive a notification, there is nothing you need to do at this time.

However, if you want to learn more about Universal Credit you can find further information at **Understanding Universal Credit.gov.uk(link is external)(link is external)**. Accordion title 1

I haven't received a letter telling me to claim Universal Credit, but I want to make a claim. What do I do?

You can find more about what a move to Universal Credit would mean for you including details of how to make a claim at **Understanding Universal Credit.gov.uk(link is external)**.

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Re-issuing a migration notice

Can claimants be re-issued a migration notice?

A copy of the migration notice can be re-issued to a claimant if they specifically request it. This service should not be offered to a claimant unless they ask for it.

Their original claim by date still applies.

Agent action to re-issue a migration notice

You must not create a new version of the migration notice to send to the claimant.

You must use the original version that was sent to them. You must not change the dates or any of the information.

You can find the original version in the Move to Universal Credit (managed migration) Sharepoint folders.

You must then upload and issue this through GOV.UK Notify as you would have done with the original migration notice.

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Tax Credit renewal pack and migration notice

What do I do if the claimant has received both their Tax Credits renewal pack and a Universal Credit migration notice, and asks whether they need to complete their Tax Credits renewal?

Advise the claimant they must complete their Tax Credits renewal as normal, and make a claim to Universal Credit as they have received a migration notice.

What do I do if the claimant mentions the Universal Credit leaflet within their Tax Credits renewal pack and the Universal Credit migration notice?

Advise the claimant the leaflet was sent to Tax Credits claimants during the renewals cycle, for them to consider whether they would be better off applying for Universal Credit.

As they have now received a migration notice, this replaces the Universal Credit leaflet as they have been officially invited to move to Universal Credit.

If they wish to continue to receive welfare support, they must make a claim to Universal Credit by the date on their migration notice.

If they decide not to make a claim for Universal Credit, their Tax Credits will still end.

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Claimant is unable / will not make a claim to Universal Credit

I will not be able to make a claim before my deadline date. What do I do?

Follow actions in: **Claimant requests an extension or needs additional support to make a claim by their deadline date: Move to Universal Credit (managed migration).**

I've had my migration notice letter, but I won't be making a claim to Universal Credit

- establish why the claimant does not want to make a claim to Universal Credit
- explain that if they choose not to make a claim before the date stated in their migration notice letter, legacy benefits will close and payments will stop
- advise the claimant, they can make a claim to Universal Credit at a later date if they change their mind, but we will not be able to protect their legacy entitlement if it is more than 1 month after the claim by date
- additional information and support are available on **Managed move of claimants to Universal Credit set to restart: GOV.UK(link is external)**
- record the reason the claimant has stated for not wanting to make a claim in 'Contact history' of the 'Track Move to UC migration spreadsheet'

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Making a claim to Universal Credit

How do I make a claim to Universal Credit?

You can apply for Universal Credit online at GOV.UK

If you live with your partner:

- you must both create accounts
- link the accounts together when you claim
- you cannot claim by yourself

I am unable to make an online claim / don't have access to the internet / don't have a computer. How can I make a claim?

If you do not have access to the internet or a computer at home, there are other places where you can access computers and the internet for free, including Jobcentres.

Support with making a claim can also be provided by Citizens Advice Help to Claim services.

If you have a smartphone or tablet, these can also be used to make and manage a claim.

Explain to the claimant that if they are capable of making an online claim, there are many advantages to this, including:



- 24-hour access to their online account
- an online journal to keep track of their claim
- the ability to update circumstances immediately
- view when payments are due

After discussing the nature of the online claim with the claimant

If it is clear the claimant can make and maintain their claim by online self-service, but needs support to do so (this is typically linked to skills, confidence, lack of motivation and access), consider if the following would be appropriate:

- **Assisted digital**
- **Help to claim**

The facility for claimants to make a new claim by phone is available for those claimants unable to complete the online service.

These claimants must be transferred to the National telephony line to make a new claim to Universal Credit.

Before transferring the claimant:

- advise what information they will need to make their claim:
  - dates of birth for children who will be on the claim
  - if they pay rent, how much and when
  - who they pay rent to
  - bank account details
- give them the National Service telephony number: [REDACTED] in case they are disconnected while making their claim
- ask if they have any questions about Move to Universal Credit (managed migration)
- advise they ask these questions now as the agent taking their claim by phone may not have specific Move to Universal Credit (managed migration) knowledge

If a claimant does not satisfy the above circumstances but insists on making a claim by phone, they must be allowed to do so.

### See **Transferring a call to National Telephony**

Can a Move to Universal Credit claimant be referred for a home visit to help them make a claim?

Home visits are only considered in exceptional circumstances, if you are unable to complete your new claim through the available channels:

- **Assisted Digital**
- **Help to claim**
- **Claims by phone**

When considering a home visit, please note the only action taken by the visiting officer is to communicate answers provided by you to the Service Centre agent by phone.

Agents must:

- find out from the Home visits team when the visit will take place
- consider an extension, if the claimant is referred for a home visit within 2 weeks of their claim by date

See **Home visits**

Why does my partner have to make a claim to Universal Credit? They were just part of my claim before

Universal Credit payments are calculated based on your circumstances as a household and not just you as an individual.

You must make a joint claim with your partner, if you live together:

- you will need to share a linking code, so we recommend each of you take it in turns to make your claims
- whilst making the claim, you will be asked if you have a partner, and you live together. You must select this option, and then ask for a linking code.
- when it is your partner's turn to make their claim, they will also need to select that they have a partner who they live with. They will be able to use your code, your first name and postcode to link your claims together as a joint claim
- there is a video available on **Understanding Universal Credit: Before you claim(link is external)**
- the video explains the process of making a new claim, including a joint claim
- you must both submit your claim by the claim by date

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Providing identification and other evidence

Why do I need to prove who I am / where I live / how much rent I pay? I'm already claiming benefit.

When you make a new claim to any benefit, we need you to provide up to date evidence so we can ensure we pay the right person the right amount of money.

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## Best time to claim Universal Credit

When is the best time for me to claim Universal Credit?

We are not financial advisors and cannot legally give any financial advice.

As long as you provide all of the necessary evidence for your claim to be verified within the first 30 days of your claim, you will receive your first payment after 5 weeks.

If you are in receipt of JSA(IR), ESA(IR), IS or HB, you will continue to receive payments from these benefits for the first 2 weeks of your Universal Credit claim to help with the transition. These payments will not be recovered from your Universal Credit payments.

Once you make your claim and you know when your first Universal Credit payment will be, you may want to start thinking about when your regular payments go out of your bank account.

You may want to think about setting up direct debits so that payments go out automatically, on the same date each month. For example, rent and council tax.

If you already have direct debits set up, you might need to change the dates they are taken from your accounts.

There are various organisations that can help with this, for example:

- Citizens Advice
- CAP
- Money Advice Trust
- the Money Manager tool from Money Advice Service
- My Money Steps
- National Debtline
- Policy in Practice
- Shelter for help with housing and homelessness
- StepChange

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## Informing legacy benefits of a Universal Credit claim

When I make my claim to Universal Credit, do I need to let my old benefit know?

You do not need to inform your current benefits, for example Tax Credits or JSA as DWP will contact these benefits, once you have claimed Universal Credit.

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## Universal Credit payments

When will I receive my first payment after making my claim to Universal Credit?

You will receive your first payment five weeks after making your claim, if you have completed all of your to-dos and the actions we have asked you to complete.

If you are in receipt of JSA(IR), ESA(IR), IS or HB, you will continue to receive payments from these benefits for the first 2 weeks of your Universal Credit claim to help with the transition. These payments will not be recovered from your Universal Credit payments.

If you need financial support during this time, you can claim a **new claim advance**.

Will I get the same amount of money when I claim Universal Credit?

Most people on the Move to Universal Credit (managed migration) programme will receive the same or more.

We will calculate the payment based on your individual circumstances once you have made a claim to Universal Credit.

If you are entitled to less, we will apply transitional protection. This is a top-up amount included with your Universal Credit monthly payment.

This amount may change over time if you have a change in your personal/household circumstances.

At the end of each month, you will be able to view your Universal Credit statement which shows how much you have received. The amount of **transitional protection** you receive will be clearly marked on this statement.

If you have any outstanding debt on your existing benefits, this will be transferred to Universal Credit. You will be able to see any deductions taken from your Universal Credit payment on your monthly statement.

I've heard Universal Credit is paid monthly. Can I continue to be paid fortnightly once I have made my Universal Credit claim?

When you have made your claim, we will assess your personal circumstances and can consider paying you more frequently.

The date of your first payment cannot change. This will always be five weeks after you make your claim.

If it is agreed that you are going to be paid more frequently, we will usually pay half of your Universal Credit on your first pay date and the remaining half 14 or 15 days later.

If you have housing payments, we may also be able to arrange to send these straight to your landlord.

I can't wait a month for my first payment. What can I do?

If you are claiming JSA (IR), ESA (IR), IS or HB, you will continue to receive payments from these benefits for the first 2 weeks of your Universal Credit claim to

help with the transition. These payments will not be recovered from your Universal Credit payments.

When you have made your Universal Credit claim and your identity has been verified, you can also apply for an advance payment of your Universal Credit.

This is a payment that you will gradually pay back over time through deductions from future Universal Credit payments.

If you need financial support during this time, you can claim a **new claim advance**.

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### Looking for work

Will I have to look for work if I claim Universal Credit?

Once you have made your claim to Universal Credit, your personal circumstances will be assessed to determine whether you are expected to look for work.

Universal Credit takes into account any health conditions you may have, as well as childcare and caring responsibilities.

If you have had a Work Capability Assessment (WCA) decision made on your current benefit claim that states you do not need to look for work, this decision will carry over to your Universal Credit claim.

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### Debt and deductions

Will you keep taking payments for things like gas and electric once I claim Universal Credit?

If you currently have an outstanding debt on your current benefits, this is transferred over to Universal Credit. We will continue to deduct money from your Universal Credit each month until the full debt amount is repaid.

The letter I've received mentions debt. How will I know if this applies to me?

I don't have access to your personal circumstances.

However, if you have any outstanding debt on your existing benefits then this will be transferred to Universal Credit and deducted from your Universal Credit payment.

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### Re-applying for Council Tax reductions and free school meals

When I make a claim to Universal Credit, do I have to reapply for things like council tax reductions and free school meals?

Yes. You will need to reapply for council tax benefit / free school meals once you have made your claim to Universal Credit.

You do not need to inform your current benefits, for example Tax Credits or JSA as DWP will contact these benefits, once you have claimed Universal Credit.

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### Housing payments

My Housing Benefit is currently paid directly to my landlord. What will happen on Universal Credit?

Most Universal Credit claimants who are eligible for support with their housing costs receive this into their bank account at the same time as the rest of their Universal Credit payment.

These claimants are then responsible for paying their own housing costs to their landlord. Once you know your Universal Credit pay date, you could consider setting up a direct debit/standing order to pay your landlord each month.

It is your responsibility to let your landlord know that you have made a claim to Universal Credit.

I'm anxious about receiving my housing payment directly, as I am not able to manage my finances.

Once you have made your claim, we will have a conversation about your personal circumstances and can consider paying your housing costs directly to your landlord.

If you are worried about managing your payments, there are lots of organisations that can help you with this, such as Citizens Advice.

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### Change of circumstances

What happens if I have a change of circumstances?

If you have a change of circumstances before you claim Universal Credit, you must report this to your current benefit provider. It is important that you then make a Universal Credit claim as soon as possible to ensure that you get the right amount of protection on your benefit payments.

For JSA/ESA/IS, you can report a change by calling [REDACTED]

For Tax Credits, you can report a change online through GOV.UK or by calling [REDACTED]

For Housing Benefit, you must report changes to your Local Authority.

If you have a change of circumstances after making a Universal Credit claim, you will report this through your Universal Credit online account.

My phone number / address has changed, what do I need to do?

Ask the claimant what their new phone number / address is.

If the claimant's phone number has changed, record the new number in the 'New primary number' column in the 'Track Move to UC migration' spreadsheet.

If the claimant's address has changed, record the new address and post code in the 'New address' and 'New post code' columns in the 'Track Move to UC migration' spreadsheet.

Explain to the claimant that they also need to report this change to their current benefit provider(s).

Give the claimant the relevant contact details (see below) so that they can report their change to each of their current benefits.

Note: You can check the 'Award' column to see which benefits the claimant is receiving.

- JSA/ESA/IS claimants call [REDACTED]
- Tax Credits claimants can report a change online through GOV.UK or by calling [REDACTED]
- Housing Benefit claimants must report their change to the Local Authority

The claimant should record these contact details for any future changes that might occur before they make their Universal Credit claim.

If the claimant is in receipt of JSA, ESA or IS:

- explain that you will transfer them to a different DWP telephone line now to report their change to their current benefit provider
- tell the claimant if they are also in receipt of Tax Credits or Housing Benefit, they must report the change to HMRC and/or the Local Authority as soon as possible
- ask them if they have any other questions relating to their Move to Universal Credit before they are transferred
- answer any further questions the claimant may have
- complete a **cold transfer(link is external)** to the working age telephony line on [REDACTED]
- record this action and the advice given on the 'Track Move to UC migration' spreadsheet

If the claimant is not in receipt of JSA, ESA or IS:

- tell the claimant they must report the change to HMRC and/or the Local Authority as soon as possible
- ask them if they have any other questions relating to their Move to Universal Credit
- answer any further questions the claimant may have

- end the call
- record this action and the advice given on the 'Track Move to UC migration' spreadsheet

My circumstances have changed. What do I need to do?

If this is a change in phone number or address:

- follow the instructions under 'My phone number / address has changed, what do I need to do?'

Explain to the claimant that they need to report this change to their current benefit provider(s).

Give the claimant the relevant contact details (see below) so that they can report their change to each of their current benefits.

Note: You can check the 'Award' column to see which benefits the claimant is receiving.

- JSA/ESA/IS claimants call [REDACTED]
- Tax Credits claimants can report a change online through GOV.UK or by calling [REDACTED]
- Housing Benefit claimants must report their change to the Local Authority

The claimant should record these contact details for any future changes that might occur before they make their Universal Credit claim.

If the claimant is in receipt of JSA, ESA or IS:

- explain that you will transfer them to a different DWP telephone line now to report their change to their current benefit provider
- tell the claimant if they are also in receipt of Tax Credits or Housing Benefit, they must report the change to HMRC and/or the Local Authority as soon as possible
- ask them if they have any other questions relating to their Move to Universal Credit before they are transferred
- answer any further questions the claimant may have
- complete a **cold transfer(link is external)** to the working age telephony line on [REDACTED]
- record this action and the advice given on the 'Track Move to UC migration' spreadsheet

If the claimant is not in receipt of JSA, ESA or IS:

- tell the claimant they must report the change to HMRC and/or the Local Authority as soon as possible



- ask them if they have any other questions relating to their Move to Universal Credit
  - answer any further questions the claimant may have
  - end the call
  - record this action and the advice given on the 'Track Move to UC migration' spreadsheet
- 

Available face-to-face / in person support

Can I speak to someone in person?

Establish the specific needs for a face-to-face conversation, for example:

- check claimant is aware of, and has read **Managed move of claimants to Universal Credit set to restart: GOV.UK(link is external)**
- can the question(s) be answered during the phone call

If the claimant insists on seeing somebody in person:

- explain to the claimant that:
    - this phone line is dedicated to helping claimants who have been chosen to claim Universal Credit, so while they can speak to somebody face-to-face, depending on the question, they may be referred back to this telephone line
    - they can visit a jobcentre during the normal opening hours to speak to someone face-to-face, but they may not be able to provide as much support as the dedicated Migration Notice helpline
- 

Work Capability Assessments

Do I have to go through another Work Capability Assessment?

If you have a current WCA decision on ESA then no, your current decision will be transferred over to Universal Credit.

You will still need to go through usual reassessment on the same schedule as you would have done in ESA.

If you only have a Personal Independence Payment (PIP) assessment or Adult Disability Payment (ADP) decision, you will need to have a separate WCA on Universal Credit. This is because the criteria that is checked as part of the assessment is different for these benefits.

My Work Capability Assessment decision on ESA means I don't have to look for work. Is that the same on Universal Credit?

When you make your claim to Universal Credit, your Work Capability Assessment decision carries over.

If your current WCA decision on ESA means that you do not have to look for work, this will be the same on Universal Credit.

If your WCA decision means that you currently have to do some work related activities, this will also be the same on Universal Credit.

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## Transitional Protection

### What is Transitional Protection?

Most people that claim Universal Credit will receive the same or more money than they did on their previous benefits.

For people who have received a migration notice and make a claim to Universal Credit before their claim by date, if the amount of Universal Credit the claimant is entitled to is less than the amount they were entitled to on their legacy benefit(s), a transitional protection top-up is available.

This is an amount which tops-up their Universal Credit and is included as part of their monthly payment.

The amount of transitional protection is not the same for everybody, and it can change over time if your personal circumstances change.

You will only receive transitional protection if you have a migration notice and claim by the claim by date.

### Will I receive Transitional Protection?

Whether or not you will receive transitional protection, and how much this will be, will all be calculated before you receive your first Universal Credit payment. This cannot be calculated beforehand.

You must have proved your ID and be eligible for Universal Credit to receive transitional protection.

Transitional protection cannot be calculated until all the required evidence has been verified.

Those who require the transitional protection top-up will receive this automatically.

You will be able to see how much transitional protection you have received before each Universal Credit payday.

Claimant makes contact after making their claim to Universal Credit

How do I record contact and update claimant information after they have made their claim to Universal Credit?

If a claimant makes contact after making their claim to Universal Credit, any information and actions must be recorded in the service rather than the 'Track Move to UC migration' spreadsheet.

Telephone ID checks must be completed using the standard Universal Credit processes and any relevant information must be recorded in the 'Claim History'.

Claimants are expected to use their online account, journal and report changes in the same way as any other Universal Credit claimant.

They can still contact the migration notice helpline if they have a query specifically relating to Move to Universal Credit (managed migration), such as transitional protection.

If a claimant wants to change their contact details including address or telephone number, the spreadsheet does not need to be updated. The claimant must report this using their Universal Credit online account.

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#### Reminder notice

Why have I received a second letter reminding me to claim Universal Credit?

It has been over 7 weeks since we sent you your first letter (migration notice) directing you to claim Universal Credit.

Our records currently show that you have not yet made a claim.

We have sent you this second letter as a reminder that you need to do so before the claim by date specified on your letter.

On the claim by date, any current claims you have to the following benefits will stop:

- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Housing Benefit
- Income Support
- Child Tax Credits
- Working Tax Credits

If you have already made your claim to Universal Credit then you do not need to take any further action. This letter will have been created and sent before your claim was verified.

Claims are not recognised by our systems until ID has been verified. This can take a few days.

Please make sure you have completed all of the necessary actions on your Universal Credit claim and check your online account regularly as you may be asked to provide further evidence and information.

I never got the first letter telling me to claim Universal Credit. Why have I received a letter reminding me to claim Universal Credit?

We sent a letter 7 weeks ago to the same address, directing you to make a claim to Universal Credit by a specific claim by date. This is the same claim by date as the one on your reminder letter.

On the claim by date, any current claims you have to the following benefits will stop:

- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Housing Benefit
- Income Support
- Child Tax Credits
- Working Tax Credits

Universal Credit has replaced these benefits. So it is important that you make a claim before the claim by date so that you can continue to receive benefit payments.

If a claimant asks about having their original migration notice re-issued, see: **Re-issuing a migration notice**.

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## Extensions

Why have I received a letter telling me that my deadline date to claim Universal Credit has been extended?

We have sent you 2 letters over the past 3 months directing you to make a claim to Universal Credit.

Our records currently show that you have not yet made a claim and we have sent you this extension letter because your original claim by date for making a claim to Universal Credit has now passed.

We have given you an additional 5 weeks to make your claim and you will be able to see your new deadline date on your letter.

On the new claim by date, any current claims you have to the following benefits will stop:

- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Housing Benefit
- Income Support
- Child Tax Credits

- Working Tax Credits

There are many ways that you can get support with making your claim should you need it.

You must make a claim by this claim by if you need financial support. You should do this as soon as possible so you don't miss this claim by date.

I have already made my claim to Universal Credit. Why have I received an extension letter?

If you have already made your claim to Universal Credit, you do not need to take any further action. This letter will have been created and sent before your claim was verified.

Claims are not recognised by our systems until ID has been verified. This can take a few days.

Please make sure you have completed all the necessary actions on your Universal Credit claim and check your online account regularly as you may be asked to provide further evidence and information.

I've received an extension letter telling me to claim Universal Credit, but I never received the original letters asking me to claim. What do I need to do?

We have sent two previous letters to the same address as your extension letter directing you to make a claim to Universal Credit by a specific claim by date.

The original claim by date that we gave you has now passed, so we have sent you the extension letter with a new deadline date to give you some additional time to make your claim.

It is important that you make a claim to Universal Credit by the claim by date on your letter because on that date any current claims you have to the following benefits will stop:

- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Housing Benefit
- Income Support
- Child Tax Credits
- Working Tax Credits

Universal Credit has replaced these benefits. So, you need to make a claim before the claim by date in order to continue receiving benefit payments.

There are many ways that you can get support with making your claim should you need it.

If a claimant asks about having their original migration notice re-issued, see: **Re-issuing a migration notice**.

Can my deadline date be extended? / Can I have some additional time to make my claim?

Follow actions in: **Claimant requests an extension or needs additional support to make a claim by their deadline date: Move to Universal Credit (managed migration)**.

Why have I received a voicemail about claiming Universal Credit?

Check the 'Award' column on the 'Track Move to UC migration' spreadsheet.

If the claimant is in receipt of JSA, ESA, or IS:

- go to step 2.2 in **DWP benefit claimants: Contacting an 'ETS' claimant following enhanced support checks**

If the claimant is not in receipt of JSA, ESA or IS:

- go to step 2.2. in **Non-DWP benefit claimants: Contacting an 'ETS' claimant following an automatic extension**
- 

## Suspensions

What do I do if a claimant makes contact following their legacy benefits being suspended?

1.1: Ask the claimant:

- Have you already spoken to a different team who have removed the suspension from your current benefits?

If the claimant is unsure in any way: go to 1.2

If the claimant answers 'Yes': go to 1.5

If the claimant answers 'No': go to 1.2

1.2: Explain the following to the claimant:

- DWP have been attempting to make contact with them over the last few months about moving to Universal Credit
- DWP sent them a number of letters with a claim by date by which they were expected to make a claim. Attempts were also made to contact them by phone
- their benefits have been suspended because their original claim by date for making a claim to Universal Credit has now passed

- while their current benefits have been suspended, they have been granted some additional time to make their claim to Universal Credit and been given a new claim by date. They will have been sent a letter to confirm this

If the claimant says they have not received any letters, ask them to confirm their address and cross check the information with the address / correspondence address held on the 'Move to UC migration' spreadsheet.

If we currently hold an incorrect or out of date address, update the spreadsheet with the new details.

You will now take action to remove the suspension.

Go to 1.3

1.3: Take the following action:

Access CIS (searchlight) and locate the claimant's National Insurance Number (NINo).

Access the 'M2UC-SUSPENSION URGENT' SCOLA Microsoft Teams chat and send the following message:

- 'Remove suspension for claimant (insert NINo) as they have made contact through the Move to Universal Credit Migration Notice helpline. Once the suspension has been removed, reply to this message with 'Suspension removed'.

**Important:** The Microsoft Teams chat is constantly monitored. You should receive an almost immediate response to confirm receipt of the message. However, you do not need to wait for the response before continuing the call with the claimant.

**Important:** Once you have received confirmation that the suspension has been removed, the Microsoft Teams message containing the claimant's NINo must be deleted.

Take the following action:

- cross check the claimant's phone number with the numbers held in the 'Move to UC migration' spreadsheet
- if the claimant provides a contact number that we do not hold, add this to the spreadsheet under the 'Primary contact number' column
- tell the claimant that if they are currently due any payments from their current benefits, these will be sent to them by faster payment and will appear in their account before midnight
- if there are any issues with the payment, we will contact them on the number they have provided

Go to 1.4

1.4: Explain to the claimant:

- even though the suspension on their payments has been lifted, they do still need to make a claim to Universal Credit as soon as possible
- the benefits they are currently in receipt of are being replaced by Universal Credit and will be stopped, so it is very important that they make a claim by their claim by date

Make sure the claimant knows their current claim by date for claiming Universal Credit. Agents can find this information by checking yhr 'CLaim by date' in the Move service.

Answer any questions the claimant may have relating to their Move to Universal Credit.

Discuss and agree with the claimant the method they will use to make their claim.

Most claimants will be able to make an online claim to Universal Credit without support. However, others will require additional help to make their claim.

For information on the support options available for making a claim to Universal Credit: see '**Making a claim to Universal Credit**'.

In circumstances where a claimant feels they will be unable to make a claim to Universal Credit by their current claim by date, a **claimant requested extension** can be considered. However, this should only be considered where absolutely necessary.

Record any additional information in the 'Contact History' section of the spreadsheet.

End of process.

1.5: Explain to the claimant:

- even though the suspension on their payments has been lifted, they do still need to make a claim to Universal Credit as soon as possible
- the benefits they are currently in receipt of are being replaced by Universal Credit and will be stopped, so it is very important that they make a claim by the claim by date given on their letter

Make sure the claimant knows their current claim by date for claiming Universal Credit. Agents can find this information by checking the 'Claim by date' in the Move service.

If the claimant says they have not received any letters, ask them to confirm their address and cross check the information with the address / correspondence address held on the 'Move to UC migration' spreadsheet.

If we currently hold an incorrect or out of date address, update the spreadsheet with the new details.

Cross check the claimant's phone number with the numbers held in the spreadsheet. If the claimant provides a contact number that we do not hold, add this to the spreadsheet under the 'Primary contact number' column.



Answer any questions the claimant may have relating to their Move to Universal Credit.

Discuss and agree with the claimant the method they will use to make their claim.

Most claimants will be able to make an online claim to Universal Credit without support. However, others will require additional help to make their claim.

For information on the support options available for making a claim to Universal Credit: see '**Making a claim to Universal Credit**'.

In circumstances where a claimant feels they will be unable to make a claim to Universal Credit by their current claim by date, a **claimant requested extension** can be considered. However, this should only be considered where absolutely necessary.

Record any additional information in the 'Contact History' section of the spreadsheet.

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Legacy benefit termination

Why have I received a letter saying that my benefits are ending?

Locate the 'Version of UC termination letter sent' column on the 'Track Move to UC migration' spreadsheet.

Check which version of the termination letter the claimant was sent.

Claimant was sent 'Requested termination v1' or 'MNT1'

Explain the following to the claimant:

- you have been sent this letter because you previously contacted us to say that you were not going to make a claim to Universal Credit, even though your existing benefits were ending
- the letter you have received is to notify you that your claim by date to make a claim to Universal Credit has now passed and the benefits listed on your letter will now stop
- if you are in receipt of Income-based Jobseeker's Allowance, Income-related Employment and Support Allowance, Income Support, or Housing Benefit, you will continue to receive payments from these benefits for the next 2 weeks, after which these payments will stop
- if you are in receipt of Tax Credits, these payments will stop immediately
- you will receive letters from your benefit providers in the near future to notify your entitlement to these benefits has now ended
- if you still wish to continue receiving financial support, you must make a Universal Credit claim as soon as possible

- there is a section at the bottom of your letter called 'You can change your mind'
- if you make a claim to Universal Credit by the date shown in this section of the letter and your circumstances have not changed, then transitional protection is still available

Answer any further questions the claimant may have.

Make sure the claimant is aware of the support available to help them in **Making a claim to Universal Credit**.

End the call and record any relevant information in 'Contact History'.

Claimant was sent the 'MNT2'

- you have been sent a number of letters in recent months to tell you that you need to make a claim to Universal Credit
- we also managed to speak to you over the phone and discussed the support available to help you make a claim
- the date of this contact can be found on your letter
- the letter you have received is to notify you that your claim by date to make a claim to Universal Credit has now passed and the benefits listed on your letter will now stop
- if you are in receipt of Income-based Jobseeker's Allowance, Income-related Employment and Support Allowance, Income Support, or Housing Benefit, you will continue to receive payments from these benefits for the next 2 weeks, after which these payments will stop
- if you are in receipt of Tax Credits, these payments will stop immediately
- you will receive letters from your benefit providers in the near future to notify you that your entitlement to these benefits has now ended
- if you still wish to continue receiving financial support, you must make a Universal Credit claim as soon as possible
- there is a section at the bottom of your letter called 'You can still claim'
- if you make a claim to Universal Credit by the date shown in this section of the letter and your circumstances have not changed, then transitional protection is still available

Answer any further questions the claimant may have.

Make sure the claimant is aware of the support available to help them in **Making a claim to Universal Credit**.

End the call and record any relevant information in 'Contact History'.

Claimant was sent the 'MNT3'

- you have been sent a number of letters in recent months to tell you that you need to make a claim to Universal Credit
- we also made multiple attempts to contact you over the phone to discuss the support available to help you make a claim
- the letter you have received is to notify you that your claim by date to make a claim to Universal Credit has now passed and the benefits listed on your letter will now stop
- if you are in receipt of Income-based Jobseeker's Allowance, Income-related Employment and Support Allowance, Income Support, or Housing Benefit, you will continue to receive payments from these benefits for the next 2 weeks, after which these payments will stop
- if you are in receipt of Tax Credits, these payments will stop immediately
- you will receive letters from your benefit providers in the near future to notify you that your entitlement to these benefits has now ended
- if you still wish to continue receiving financial support, you must make a Universal Credit claim as soon as possible
- there is a section at the bottom of your letter called 'You can still claim'
- if you make a claim to Universal Credit by the date shown in this section of the letter and your circumstances have not changed, then transitional protection is still available

Answer any further questions the claimant may have.

Make sure the claimant is aware of the support available to help them in **Making a claim to Universal Credit**.

End the call and record any relevant information in 'Contact History'.

Claimant was sent the 'MNT4'

- you have been sent a number of letters in recent months to tell you that you need to make a claim to Universal Credit
- we also made multiple attempts to contact you over the phone to discuss the support available to help you make a claim
- after we were not able to contact you and your claim by date passed, the payments from your current benefits were suspended
- we wrote to you notifying you of the suspension and your new claim by date for making a claim to Universal Credit
- the intent of the new claim by date was to give you some additional time in which to make your claim

- the letter you have received is to notify you that your claim by date to make a claim to Universal Credit has now passed and the benefits listed on your letter will now stop
- if you are in receipt of Income-based Jobseeker's Allowance, Income-related Employment and Support Allowance, Income Support, or Housing Benefit, you will continue to receive payments from these benefits for the next 2 weeks, after which these payments will stop
- if you are in receipt of Tax Credits, these payments will stop immediately
- you will receive letters from your benefit providers in the near future to notify you that your entitlement to these benefits has now ended
- if you still wish to continue receiving financial support, you must make a Universal Credit claim as soon as possible
- there is a section at the bottom of your letter called 'You can still claim'
- if you make a claim to Universal Credit by the date shown in this section of the letter and your circumstances have not changed, then transitional protection is still available

Answer any further questions the claimant may have.

Make sure the claimant is aware of the support available to help them in **Making a claim to Universal Credit**.

End the call and record any relevant information in 'Contact History'.

Can I have a new deadline to make a claim?

As your claim by date has now passed, you cannot be given a new claim by date.

However, if you make a claim to Universal Credit by the date provided in the 'You can still claim' section of the letter, you will still be entitled to transitional protection as long as your circumstances have not changed. You should make a claim as soon as possible.

# Move to Universal Credit (managed migration): Transferring calls to National Telephony

The Migration Notice helpline may receive calls from people who are unable to make an online claim to Universal Credit.

After discussing what options are available, if it is clear the claimant is not able to make the claim online, or insists on making a claim by phone, the call must be transferred to the National Telephony line.

When a call is received, the telephone number of the incoming call is displayed in the top left corner of the screen

Before transferring the call, give the caller the National Telephony telephone number: [REDACTED], in case they are disconnected.

If you are transferring them for a claim by phone, make sure you have taken all of the actions required.

The following steps are taken to transfer the call:

Step 1: select the telephone and arrow icon

Step 2: in the 'name and number' text box, enter the National Telephony number:

[REDACTED]

Step 3: select the telephone and arrow icon again, to transfer the call to the National Telephony line

# Move to Universal Credit (managed migration): Transitional Protection

## Background

Universal Credit is calculated differently to legacy benefits. This means that a claimant moving to Universal Credit might not be paid the same amount as they received before.

## Transitional Protection

For those who claim Universal Credit as part of the Move to Universal Credit (managed migration) programme, if the amount of Universal Credit the claimant is entitled to is less than the amount they were entitled to on their legacy benefit(s), a transitional protection top-up is available.

Claimants who do not make a claim before their claim by date, but do make a claim within one assessment period of their claim by date are still entitled to Transitional Protection.

However, if they make a claim more than one assessment period after their claim by date, they are not entitled to Transitional Protection, even if their claim is backdated.

For example, if a claimant has a claim by date of 14 December 2022, as long as they make a claim by 13 January 2023, they will be considered for Transitional Protection and their claim will be backdated to 14 December 2022.

If they make a claim after 13 January 2023, they are not entitled to Transitional Protection.

Those who claim as part of Move to Universal Credit (managed migration) are also exempt from some of the normal eligibility rules for claiming Universal Credit. These exemptions apply to students and those in receipt of Tax Credits. See: **Move to Universal Credit (managed migration)**

Some claimants who were in receipt of Severe Disability Premium (SDP) will also be in receipt of Transitional Protection, even though they are not part of the Move to Universal (managed migration) programme. See: **Spotlight on: Severe Disability Premium Transitional Protection overview**

Other than claimants previously in receipt of SDP, those who claim Universal Credit naturally through a change of circumstances or voluntarily, and are not part of the Move to Universal Credit (managed migration) programme, will not receive Transitional Protection.

## Transitional Protection calculation

Transitional Protection is calculated by comparing the total amount of all legacy benefit(s) the claimant had been awarded, with the total amount of Universal Credit they would be entitled to (Universal Credit notional amount). These figures are both based on the circumstances on which their legacy benefit(s) awards were made the day before they made a new Universal Credit claim.

Where the Universal Credit indicative amount is lower, the Transitional Protection top-up will be available to make up the difference and will be paid as part of the Universal Credit award.

## Transitional Protection: impact on Universal Credit award

The monthly Transitional Protection is paid at the end of every assessment period as part of the Universal Credit award. It forms part of the maximum award calculation.

On the Universal Credit statement, it shows as a separate amount in the 'What you are entitled to' section, under the heading 'Transitional Protection'.

## Impact of earnings on Transitional Protection

An increase in earnings, will not erode a claimant's Transitional Protection top-up payment.

However, the Transitional Protection top-up payment is added to the claimant's entitlement before any deductions in the same way as any other element such as housing. So, while their Transitional Protection top-up entitlement is still the same, their take home payment from Universal Credit may be lower due to the impact of the increased earnings on the overall award.

A decrease in earnings does not impact a claimant's Transitional Protection top-up payment, unless they have earnings equal to or above the **Administrative Earnings Threshold** (AET) in their first assessment period, and their earnings then drop below the AET for more than 3 consecutive assessment periods at any time during the Universal Credit claim.

If this happens, the claimant's Transitional Protection top-up payments will stop.

A claimant's Transitional Protection top-up entitlement will not be affected by fluctuating earnings. Even if the claimant is earning a different amount each month, their Transitional Protection top-up entitlement remains the same unless it erodes for a different reason.

However, their take home pay from Universal Credit will change based on the impact their earnings have on the overall award, in the same way it would for any other claimant.

The work allowance and earnings taper rules still apply.

Transitional Protection: erosion

Erosion is where the Transitional Protection reduces as the amount awarded for other components of Universal Credit increases.

Transitional Protection is not time limited but will erode when:

- there is an increase to the Universal Credit maximum award following an increase in the Standard Allowance or additional element (for example, uprating), except for the childcare costs element
- a new Universal Credit element (such as support with housing costs) is awarded, (except for the childcare costs element)

It is not possible for the Transitional Protection to start eroding until the second assessment period after the claimant starts receiving the payments.

When this happens, the Transitional Protection will erode penny for penny with the increase to the Universal Credit maximum amount.

The erosion happens in the same assessment period that the increase is paid.

An increase in earnings does not erode Transitional Protection.

Transitional Protection is not increased by uprating. However, it is eroded by the uprating of all other Universal Credit elements in the award, except the childcare cost element.

Once Transitional Protection has fully eroded, it cannot be re-instated except where there has been a recalculation or successful appeal.

Transitional Protection will no longer apply from the assessment period in which it has eroded to nil.

Example of Transitional Protection erosion

A claimant receiving Transitional Protection has a Universal Credit award of £1000 at the end of their assessment period.

The claimant's Standard Allowance and additional amounts for housing and children add up to £880. The claimant also receives £120 in Transitional Protection. This means the total award the claimant sees on their statement is £1000.

Transitional Protection will appear separately on the Universal Credit statement.

In the next assessment period, the claimant reports a change of circumstances. Their housing costs have increased and the change is verified. As the claimant has not yet reached their Local Housing Allowance rate, their additional amount for housing increases by £50.



At the end of the assessment period, this means that the total amount of the claimant's Standard Allowance and additional amounts for housing and children is £930 rather than the £880 it was in the previous assessment period.

Transitional Protection erodes penny for penny with any increase to the Universal Credit award, apart from childcare costs.

This means that as the claimant's Universal Credit maximum amount has increased by £50, their Transitional Protection will reduce by £50. So the Transitional Protection that was previously £120 will reduce to £70.

The claimant's award for this assessment period will be made up of £930 for the Standard Allowance and additional amounts for housing and children - and £70 of Transitional Protection. This totals £1000.

AP1: Universal Credit award is £1000 (£880 + £120 TP)

AP2: Universal Credit award is £1000 (£930 + £70 TP)

AP 1	AP 2	
Transitional Protection £120	Transitional Protection £70	The total amount of Universal Credit that the claimant receives in both AP1 and AP2 is £1000.
Additional amount for housing £234.28	Additional amount for housing £284.28	
Additional amount for children £235.83	Additional amount for children £235.83	
Standard Allowance £409.89	Standard Allowance £409.89	

Agents can see by how much the Transitional Protection has eroded by comparing the statements from the current and previous assessment periods.

When Transitional Protection stops

Transitional Protection stops in the following circumstances:

- couples forming
- couples separating
- when an increase in Universal Credit is greater than the amount of Transitional Protection in payment
- the claimant has earnings equal to or above the **Administrative Earnings Threshold** (AET) in their first assessment period and the claimant's earnings then drop below the AET for more than 3 consecutive assessment periods at any time during the Universal Credit claim
- the Universal Credit award is terminated

Once Transitional Protection has ended, it will never be re-awarded except when a claimant has an increase in household earnings that means their Universal Credit payment is nil and they are no longer entitled to Universal Credit.

In these cases, the Transitional Protection will be re-instated if they re-claim within 4 months of the end of the assessment period for which they were awarded Universal Credit

The 3 assessment periods are calculated from the end of the assessment period when earnings were increased, which resulted in no Universal Credit being awarded. This is to encourage claimants to still work and earn more where possible.

When Transitional Protection amount can be revised

Transitional Protection calculations can be revised if the information used to calculate the total legacy benefits or the Universal Credit amount was incorrect, for example where:

- official error
- a revision has been made to a legacy benefit following a Mandatory Reconsideration or appeal
- unreported change of circumstances

Benefit cap

The **benefit cap** limits a household's total entitlement to Universal Credit unless they meet one of the exemption criteria.

When the Transitional Protection calculation is carried out, claimants will not be entitled to an amount of Transitional Protection that would take them above the benefit cap.

# Move to Universal Credit (managed migration): Differences in additional support for Universal Credit claimants compared to legacy benefits

What are passported benefits?

Passported benefits are benefits or schemes some claimants are entitled to because of their entitlement to certain other benefits or Tax Credits.

Claimants must be made aware that just because they had entitlement on legacy benefits, does not mean they automatically do on Universal Credit.

Some claimants may find that entitlement to passported benefits changes on Universal Credit, as the eligibility criteria is different to when they were on legacy benefits.

The eligibility criteria for passported benefits are not set by Universal Credit policy. They are set by the Government Departments, Utility Organisations and Devolved Administrations that own them.

Help with health costs

Can I receive help with health costs on Universal credit?

Universal Credit claimants are entitled to help with health costs if, in their last assessment period they had earnings of either:

- £435 or less
- £935 or less, if the claimant's Universal Credit includes a payment for a child, or they have limited capability for work or limited capability for work and work-related activity

If you are part of a couple, the net earnings threshold applies to your combined net earnings.

Claimants entitled to help with health costs will get:

- free NHS prescriptions (the new prescription form includes a 'Universal Credit' tick box. If the old form is used, claimants should continue to select the 'Income-based Jobseeker's Allowance' box while stocks last)
- free NHS dental treatment
- free wigs and fabric supports

- free sight tests
- access to optical vouchers to help with the cost of glasses or contact lenses
- travel to an NHS appointment on referral by a primary care practitioner (for example, doctor, dentist or optician)

For further information about NHS Help with Health Costs, see **Check if you're eligible for help | NHSBSA(link is external)**

How to claim help with health costs

Claimants must show the healthcare professional their Universal Credit statement page, when their prescription is dispensed.

Claimants who are unsure about entitlement to support with health costs (for example, because they are waiting for a decision on their claim), should pay the relevant charge and ask for a refund form at the same time.

Claimants must obtain the refund form at the same time the costs are paid, as it will not be issued later. Once the claimant receives their award letter, the refund can be claimed. This must be within 3 months of the date the charge was paid.

Universal Credit claimants who meets all the criteria for help with health costs but didn't get the refund form, must contact the NHS Business Services Authority who consider applications for refunds on a case-by-case basis.

The claimant must be made aware that a refund is not guaranteed.

Penalty charges

Claimants must make sure they are claiming health costs correctly, as checks are made on forms they have signed.

If a claim is made incorrectly, or the claimant is unable to prove they are entitled, they may have to pay a penalty charge if they are then found to be not entitled.

The penalty charge will be 5 times the charge the claimant should have paid, up to a maximum of £100. Failure to pay the penalty charge, can lead to the NHS taking action in court to recover the debt.

Why is entitlement to health costs different on Universal Credit?

On legacy benefits, claimants had automatic entitlement to help with health costs, if they were in receipt of:

- Income Support (IS)
- Jobseekers Allowance Income Based (JSA IB)
- Employment and Support Allowance Income Related ESA (IR)
- Pension Credit Guarantee Credit (PCGC)

Claimants on Contribution based Jobseekers Allowance (JSA C) or Employment and Support Allowance (ESA C) were not automatically entitled to help with health costs. However, they could have been entitled on the grounds of low income.

Claimants with a valid NHS Tax Credit exemption certificate were entitled to help with health costs, if their annual family income used to calculate their Tax Credits was £15,276 or less, and they received any of the following:

- Child Tax Credit
- Working Tax Credit and Child Tax Credit paid together
- Working Tax Credit including a disability or severe disability element

## Free school meals

Are my children entitled to free school meals?

England and Wales:

Children may be entitled to free school meals where parents or guardians who are awarded Universal Credit, and whose annual net earned income does not exceed £7400 (£616.67 per calendar month).

Scotland and Northern Ireland:

For information on the threshold amounts for free school meals in Scotland and Northern Ireland:

- for Scotland see: **School meals(link is external)**
- for Northern Ireland see: **Free school meals(link is external)**

Why were my children entitled to free school meals when I was on my previous benefits but not now I'm on Universal Credit?

The eligibility criteria are different on Universal Credit to other benefits.

Previously, children could receive free school meals if their parents or guardians received:

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Child Tax Credit (provided they were not also entitled to Working Tax Credit and had an annual gross income of no more than £16,190)
- Working Tax Credit run-on, paid for 4 weeks after they stopped qualifying for Working Tax Credit

## Healthy Start

Am I eligible for a Healthy Start card on Universal Credit?

Claimants on Universal Credit may be eligible for a Healthy Start card if both of the following apply:

- they are at least 10 weeks pregnant or have at least one child aged under 4
- they (and their partner, if they have one) are earning £408 or less per month

Why did I receive a Healthy Start Card when I was on other benefits but I can't get one now I'm on Universal Credit?

Claimants could apply for a Healthy Start card if they were at least 10 weeks pregnant, or had at least one child under 4, and was in receipt of one of the following:

- Income Support
- Income-based Jobseeker's Allowance
- Pension Credit (which included the child addition)
- Working Tax Credit run-on (paid for the 4 weeks after the claimant, their partner or carer started working less than 16 hours per week) and they did not get Child Tax Credit

Claimants who were previously on Child Tax Credits could apply for a Healthy Start card if:

- they had at least one child under 4
- they had a family annual income of £16,190 or less
- they were not in receipt of Working Tax Credits

See **Passported benefits**

## Council Tax

I was told I wouldn't be any worse off on Universal Credit, so why has my council tax support reduced?

DWP are unable to guarantee an individual's entitlement to a Council Tax Reduction as this is determined and governed by the local authority in which you live.

For further information and to check eligibility, signpost the claimant to **Apply for Council Tax Reduction - GOV.UK ([www.gov.uk](http://www.gov.uk))(link is external)**.