

Transfers from Live Service to Full Service

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Introduction

This guidance is a general outline of the transfer process. Specific detailed guidance is available for both Service Centre and Jobcentre staff in offices that are transferring from Live Service to Full Service.

Universal Credit Live Service has a number of gateway conditions that exclude claimants with certain circumstances from making a new claim. Claimants who meet the gateway conditions can make a new claim online but cannot report any changes online, these are reported by phone.

Since November 2014, Universal Credit Full Service has also been running in a small number of offices and is now expanding out across the country. This is the same Universal Credit, although there are a number of policy differences. It is also built on a different IT platform and does not have any gateway conditions. It is a much more interactive service. Claimants can manage their claim using an internet-enabled device such as a smartphone, tablet or PC to:

- view their claim details
- report changes in their circumstances
- interact with their work coach through their on-line journal and 'to-do' lists
- record their work search activity

Transfer overview

From 27 January 2016, Universal Credit Live Service claimants will start to transfer onto the Full Service. This transfer will begin with Hounslow office claimants and will extend to other offices as Full service rolls out.

Claimant journey

To transfer from the Live Service, claimants will need to register for Universal Credit Full Service on GOV.UK, then book and attend an Initial Evidence interview at the Jobcentre. This will ensure the most up-to-date evidence is held for the claimant.

Claimants cannot 'opt out' and must transfer to Universal Credit Full Service to continue to receive Universal Credit.

In the weeks prior to go-live, claimants are made aware that they will soon be asked to transfer to the Universal Credit Full Service. This is the orientation stage.

Jobcentre staff will take all opportunities to explain to existing Universal Credit claimants about transferring to the Full Service – for example, when attending work search reviews. This is to ensure claimants are aware of what they need to do and identify any issues or support they may need (such as getting a bank account if they currently only have a Post Office card account).

Claimants will also be given an orientation letter to explain about the need to transfer to Universal Credit Full Service.

Claimants will be sent a second letter when it is time for them to start their transfer activities. This is their call to action letter.

Claimants will then need to:

- create an account by using the normal GOV.UK URL to enter the service (claimants will be redirected to the correct transfer service by postcode)
- enter their details online (similar to making a new claim, although it is not a new claim)
- follow the instructions to book an Initial Evidence Interview
attend the interview and provide all necessary documentation

If a claimant undertakes all of these activities, their claim will be transferred to the Full Service.

Claimant fails to undertake required actions

If the claimant does not take the action needed to transfer their claim to the Full Service or make contact, their Live Service claim will be suspended and a letter

will be sent notifying them of this. If the claimant then still takes no action, their Live Service claim will be closed and a further letter issued. The claimant will have to make a new claim for Universal Credit Full Service.

Specialist transfer team

The specialist transfer teams will deal with claims transferring from Live Service to Full Service. This includes:

- sending out orientation letters
- initiation of transfer action
- supporting digital account set up and data gather
- transferring information to enable completion of the Universal Credit Full Service claim

These are examples, not a complete list.

Transfer of data from Live Service to Full Service

As the Full Service is built on a different IT platform, key information from the Universal Credit Live Service Agent Portal and the Work Services Platform (WSP) will need to be transferred to Universal Credit Full Service.

This information will be transferred by the specialist team, once the claimant has attended their Initial Evidence Interview and all evidence for their Full Service claim has been received.

For all claimants, the following information will be transferred:

- assessment period and payday
- date of claim

If relevant, the following information will also be transferred over from the Universal Credit Live Service claim:

- Alternative Payment Arrangement
- advances
- sanctions
- deductions
- penalties
- Work Capability Assessment decisions
- Local Council Tax Reduction Scheme

Specific guidance is available for Service Centre and Jobcentre agents transferring the information from the Live Service to Full Service.

New to-do

There will be a new to-do called 'Switch claimant to Digital Service' which will be created once a claimant has made their Full Service claim. This new to-do will be

dealt with by the specialist transfer teams, who will take the appropriate action as part of the transfer process.

At the end of the first assessment period after transferring, and once the first payment has been issued, the claim will be treated as a normal Full Service claim.

Identifying a claimant that is in the transfer process

If a claimant has a status of 'Switch started, 'Declared (switching claim)' or a to-do as detailed above, the claim is in the process of being transferred from Live Service to Full Service. The specialist teams will deal with these claims.

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