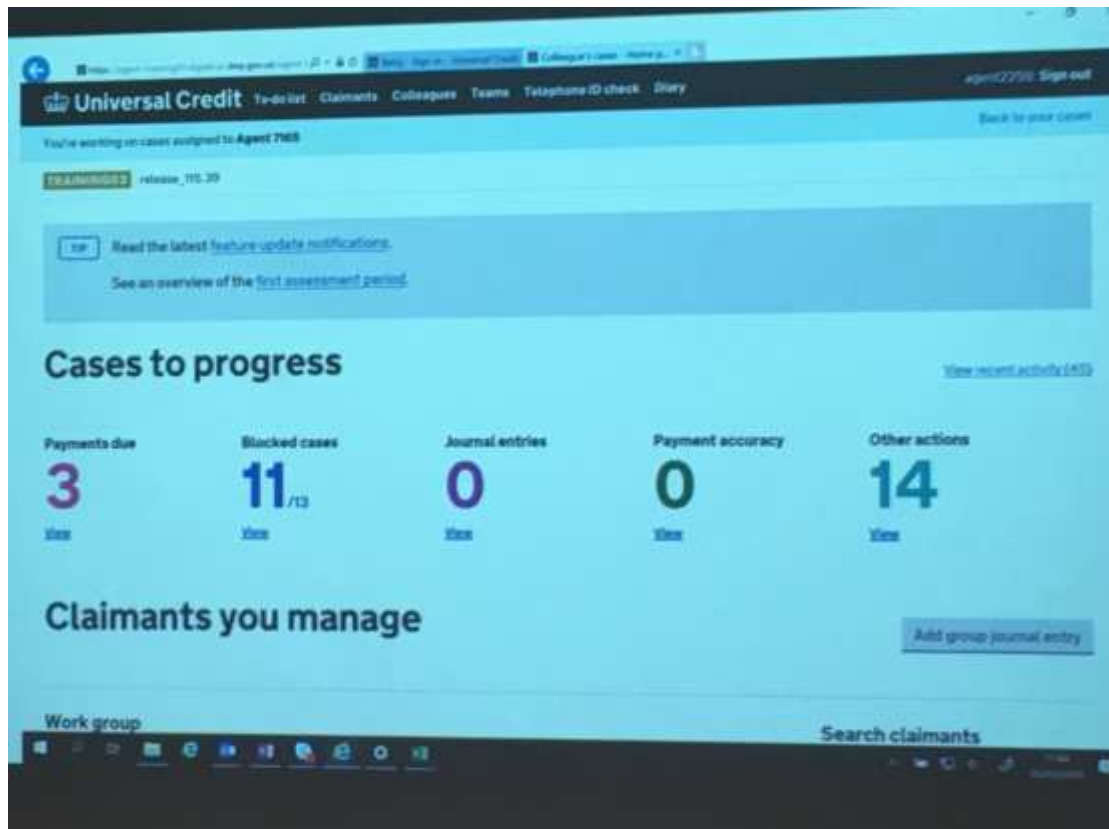


View of a universal credit claim from the work coach/case manager perspective

(Apologies for poor quality of photos – taken direct from the powerpoint during the presentation)

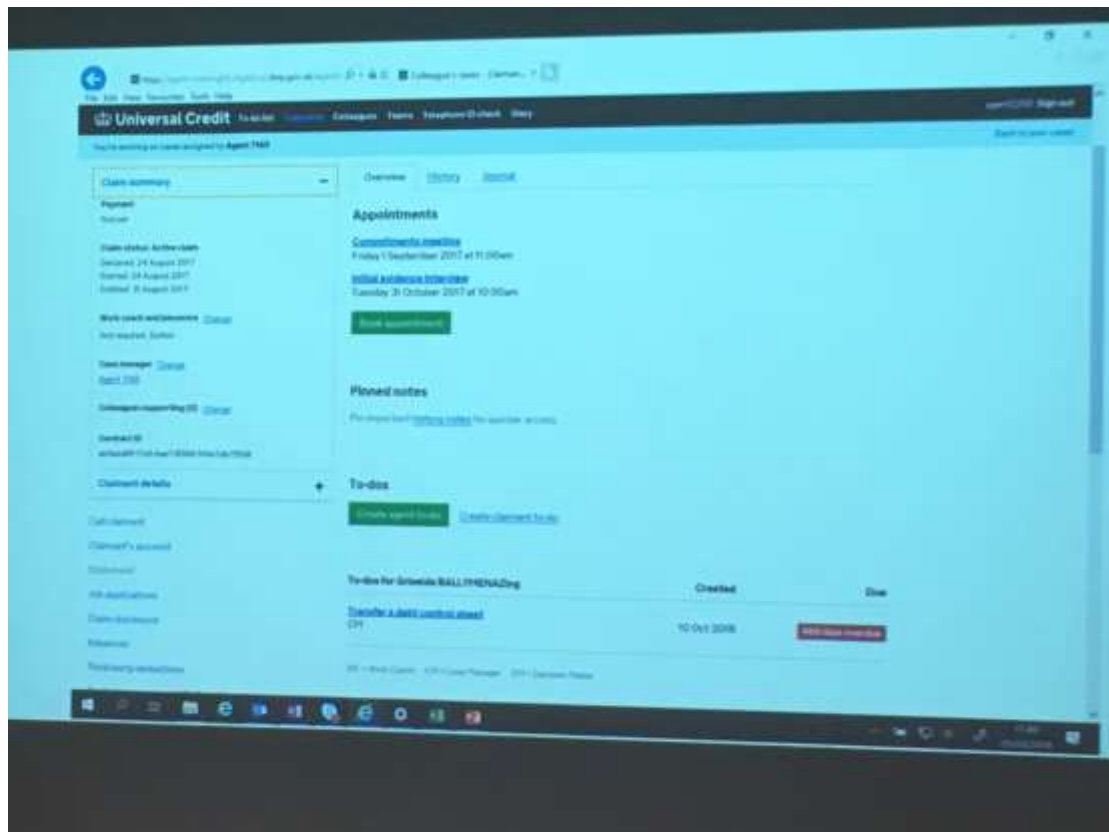
The home screen provides a dashboard of all the awards that belong to that particular case manager(CM)/work coach(WC).



The cases in 'payments due' are the highest priority and should be looked at first – the priority reduces from left to right. Cases can move across as they become more urgent. So, for example, something that is in other actions today could move to 'payments due' tomorrow if it was getting close to payday. The five different sections in 'cases to progress' are set out below.

Once the WC/CM picks up the case they are meant to deal with all outstanding actions.

The WC/CM can click on any of their claimants and see the claim summary page –



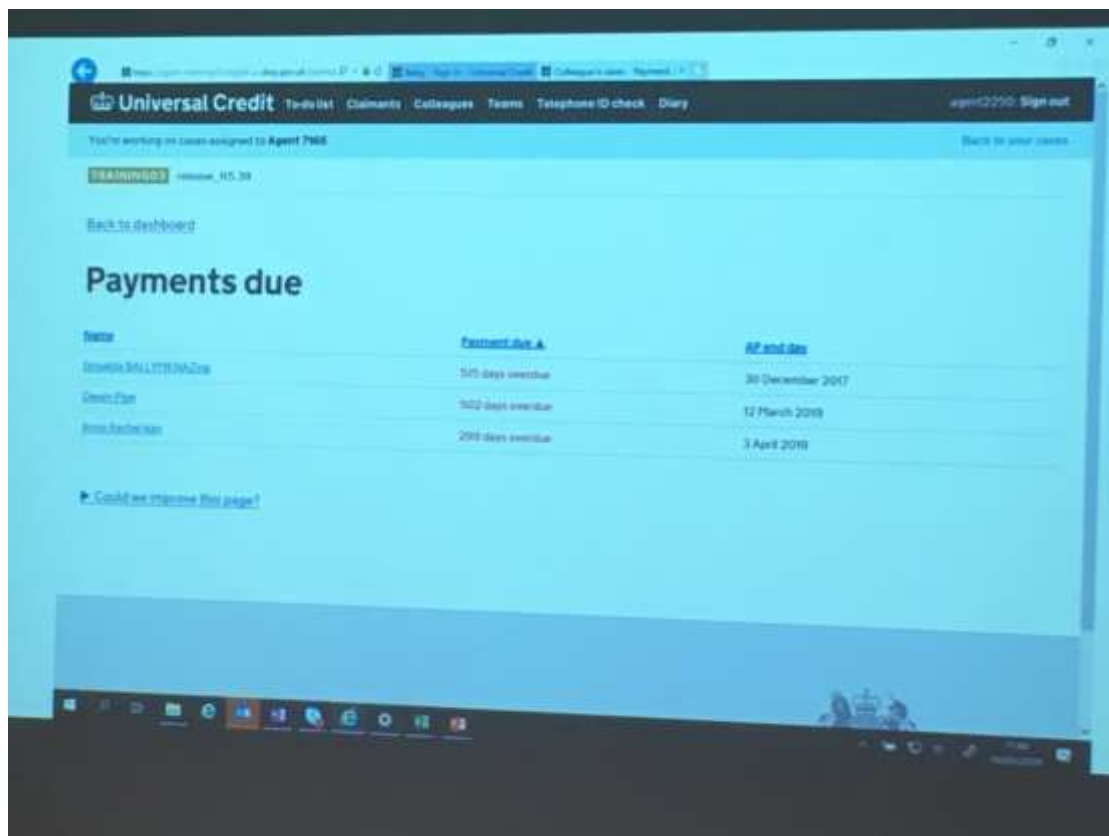
On this page they can click on 'claimant's account' which enables them to see exactly what the claimant sees on their screen. They can also add To-Dos, book appointments, add a 'pinned note' (always at top of front screen – where safeguarding info should go).

Payments due

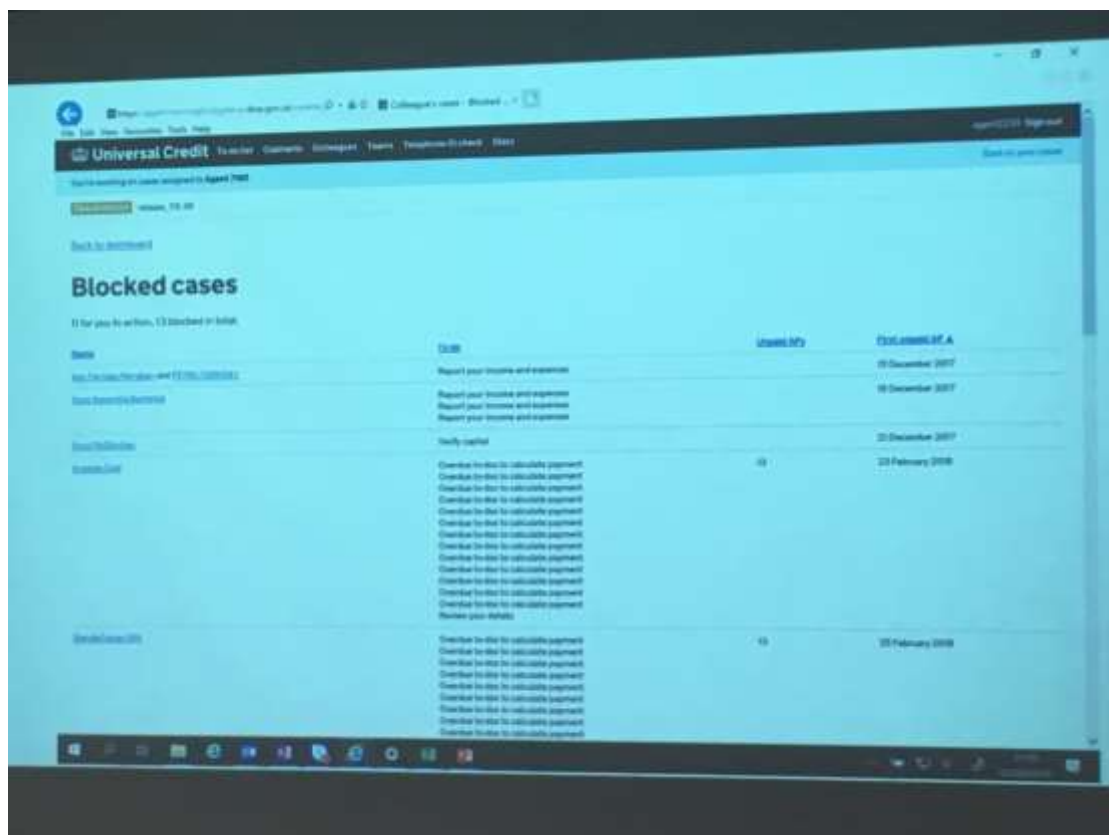
This page lists all the payments due in the CM's caseload, how overdue they are, and the assessment period end date – work at the top of the list is the highest priority.

(The DWP was at pains to point out that this is a shot form a training package and no one would have a payment that was 515 days overdue!)

This page should be the CM's first priority.



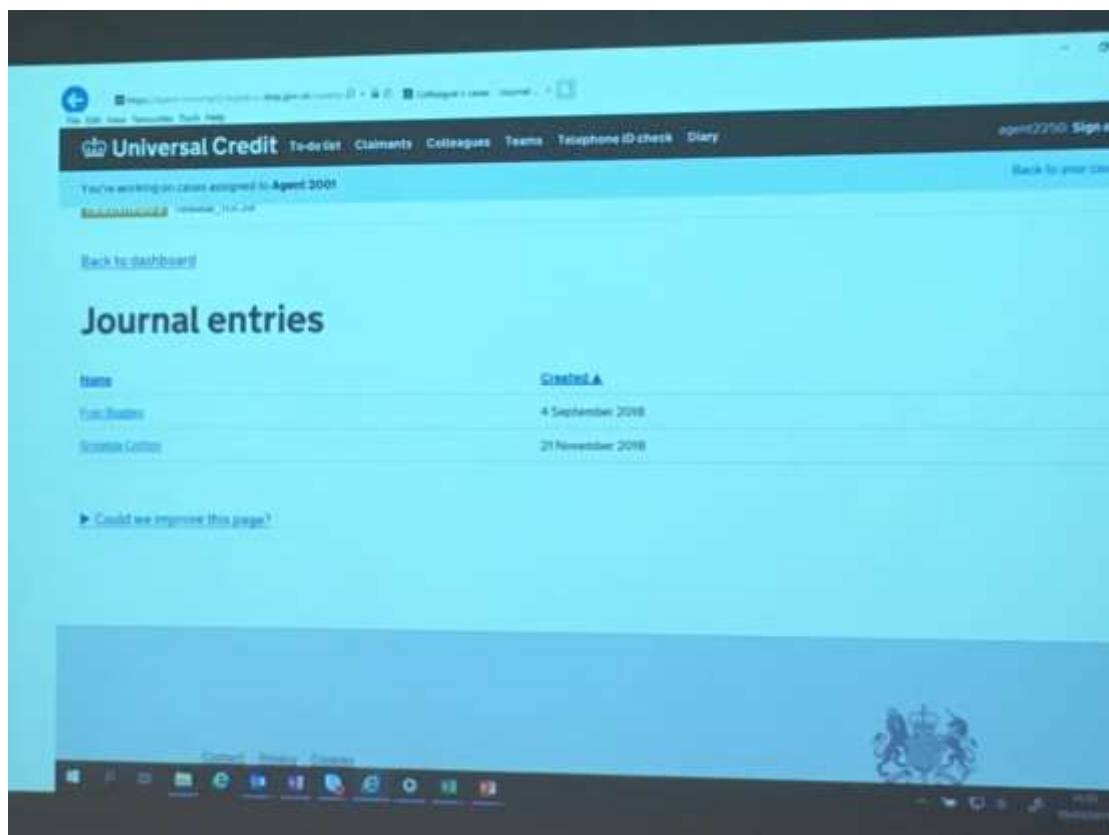
Blocked cases



These cases are the next highest priority after payments due. Cases can be blocked if there is an outstanding To-Do which could be something the DWP needs to do or the claimant needs to do eg information required as in 'report your income and expenses' for a self-employed claimant. The CM uses their own judgment on whether to chase the claimant on this – so they could make a decision that the claimant is always late reporting so therefore will leave it, or that the claimant is struggling and maybe needs an appointment to support them in meeting the requirement. We were told the CM will 'know the claimant' so they will be able to make the judgment!

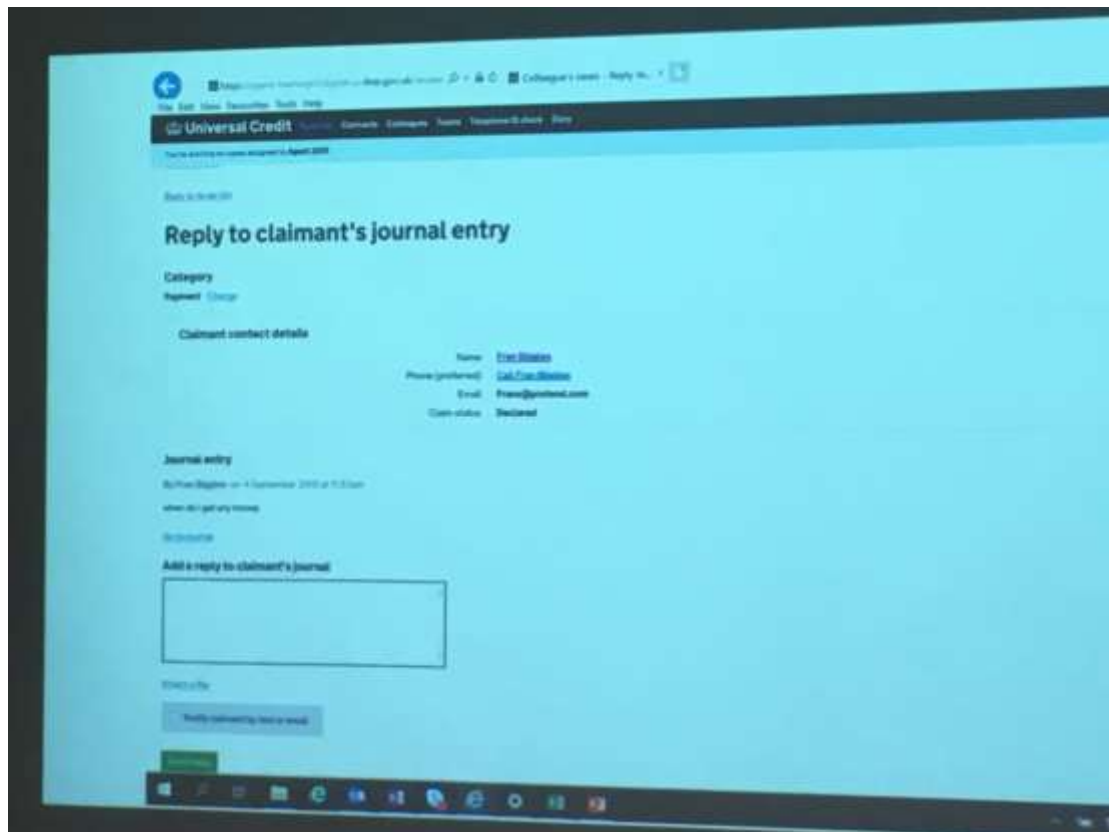
Journal entries

This screen shows claimants who have an outstanding journal entry –



The claimant at the top of the list will have the oldest journal entry that needs looking at.

They can go into the journal entry (see below) and can reply or upload a document. The reply will then be in the journal and it will remove it from the To-Do list. The CM/WC may or may not send a text/email alert to say that they have done this – again down to their individual judgment.



Payment accuracy

This screen is all about verifying stuff like children, housing costs etc, cancelling legacy claims, referring for WCA etc.

- If declared social rented housing then CM will send email to landlord portal if on it, if not on portal then manually send to landlord at start of claim.
- If need to verify children goes to DWP team that can access HMRC online - if CB in payment then fine, if not can check Home Office life events team, if not on that then book appointment to come in with child's ID.
- For private rented housing - ask claimant to come in with proof to first appointment.
- WCA referrals – all new claims now go to centralised team which checks against CIS to see if ESA previously in payment and which component in order that appropriate LCW/LCWRA element can go on - if human error happens and referral has been made for WCA CM can go in and amend, cancel WCA and put LCWRA element in

Because this is lowest priority, it doesn't always get done as promptly as it might eg might stay open beyond the six months that last in payment.