Claimant makes contact to ask for more time to claim: Move to Universal Credit (managed migration)

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

Use this process when a claimant makes contact to request an extension or inform you they do not think they can make a claim to Universal Credit by their deadline date.

Extension and / or support decision

This section is used to support agents in determining whether a claimant’s deadline date for claiming Universal Credit needs to be extended and whether they need any additional support in making a claim.

1.1: Take the following action:

Access the claimant’s record on the Move service and check for any ‘History’ entries titled ‘Claim by date extended’. These entries contain the details of any previous extensions the claimant has had.

Open all ‘Claim by date extended’ entries and read the details to find out the reasons provided for previous extensions.

This information should give you a better idea of which parts of the claiming process have been challenging for the claimant.

Check the Move service history notes to see if there is any additional information to support your discussion with the claimant.

If the claimant was issued a migration notice before 3rd May 2023, there may also be relevant notes on the 'Move to UC migration' spreadsheet.

If there are no History entries titled ‘Claim by date extended’, the claimant has not previously had any extensions.

Go to 1.2

1.2: Has the claimant already had a claim by date extension?

Yes: go to 1.3

No: go to 1.4

1.3: Ask the claimant:

* As we granted you an extension to your deadline date previously, why have you been unable to make a claim to Universal Credit during your extension period?
* Why do you think you are unable to make a claim by your extended deadline date?

It is important that you understand the claimant’s reason for requesting more time to make their claim. There are a number of good reasons that a claimant might need more time, including:

* needing more time to get the necessary documentation, evidence or information to make their claim
* needing more time to get support with making their claim
* being in hospital or having planned hospital treatment (or a similar commitment) that means they would be unable to make a claim by their deadline date

This list is not exhaustive.

Go to 1.5

1.4: Ask the claimant:

* Why are you unable to make a claim to Universal Credit by your deadline date?

It is important that you understand the claimant’s reason for requesting more time to make their claim. There are a number of good reasons that a claimant might need more time, including:

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

This list is not exhaustive.

Go to 1.5

1.5: Is the claimant’s reason relating to low digital capability or access?

Yes: go to 1.10

No: go to 1.6

1.6: Ask the claimant:

* How long do you think it will be before you can make your claim?

Go to 1.7

1.7: Is the amount of time the claimant thinks it will take them to make a claim longer than the amount of time they currently have left before their deadline?

The claimant’s current deadline date can be found by checking the ‘Claim by’ date in the Move service.

**Example:**If the claimant has told you that it will be another 4 weeks before they can claim and their deadline date is in less than 4 weeks, answer ‘Yes’.

**Example:**If the claimant has told you that it will be another 2 weeks before they can claim, but their deadline date is not for another 8 weeks, answer ‘No’.

If the claimant is unsure about how long they need. Use your discretion and knowledge of the claimant’s deadline date to determine whether they will need more time to claim than they currently have.

Yes: go to 1.8

No: go to 1.15

1.8: Explain the following to the claimant:

We can extend their deadline date by 4 weeks. If they are still struggling to make a claim by the end of their extension period, they should contact us again **more than 1 week** before their deadline to discuss their options.

Go to 1.9

1.9: Take the following action:

* open the ‘Move summary’ dropdown in the claimant’s record on the Move Service
* select the ‘Give more time’ option next to the claim by date

You will be presented with a screen showing the claimant’s current claim by date and their extension details.

* under ‘Reason for extension’, select ‘Claimant requested’
* in the free text box, record:

	+ the reason the claimant thinks they need an extension
	+ how long the claimant feels they need to make their claim
	+ how they are planning on making their claim to Universal Credit
	+ any support provided / offered to the claimant to help them claim

Where the claimant has already had an extension, you must also record the reason why they did not make a claim during their first extension period.

* select ‘Confirm’
* go to 1.18

1.10: Take the following action:

Explain to the claimant:

* if they do not have access to a computer at home, there are other places where they can access computers and the internet for free, including Jobcentres and libraries
* if they have a smartphone or tablet, these can also be used to make and manage a claim
* a friend or family member may have internet access or be able to help them make and manage their claim

Explain to the claimant that if they can make 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 an online claim with the claimant

If it is clear the claimant could make and maintain their claim by online self-service but need support to do so (this is typically linked to skills, confidence, lack of motivation and access):

* consider whether [**Assisted Digital**](https://intranet.dwp.gov.uk/policy/assisted-digital-overview) support or [**Help to Claim**](https://intranet.dwp.gov.uk/policy/spotlight-help-claim) would be appropriate

If the claimant would be unable to make and maintain an online claim, there are exceptional circumstances where they can make a claim by phone. For information on the criteria and how to support someone making a claim by phone, see: [**Spotlight on: Claims by phone**](https://intranet.dwp.gov.uk/policy/spotlight-claims-phone).

Go to 1.11

1.11: Which of the following ways of making a claim did you and the claimant decide is best for them?

They will make a claim on their own or with friends / family support: **go to 1.13**

They are going to gain support from Assisted Digital or Help to Claim: **go to 1.12**

The claimant meets the criteria for a Claim by phone: **go to 1.17**

1.12: Take the following action:

* signpost the claimant to the appropriate [**Assisted Digital**](https://intranet.dwp.gov.uk/policy/assisted-digital-overview) or [**Help to Claim**](https://intranet.dwp.gov.uk/policy/spotlight-help-claim) support
* go to 1.13

1.13: Ask the claimant when they think they will be able to make their claim by

* Go to 1.14

1.14: Does the claimant still have enough time to be able to make their claim by their deadline date?

Yes: go to 1.15

No: go to 1.16

1.15: Take the following action:

* tell the claimant that if in the future they believe they will not be able to make their claim by the deadline date on their migration notice letter, they must call the number on the letter and let us know
* it is very important that they make contact more than 1 week before their deadline where possible if they do not think they will be able to make a claim
* answer any further questions the claimant may have
* end the call

End of process.

1.16: Take the following action:

If the claimant says they need more than an additional 4 weeks after their current deadline to make their claim, explain the following:

We can only extend their deadline date by a maximum of 4 weeks. If they are still struggling to make a claim by the end of their extension period, they should contact us again **more than 1 week before their deadline** to discuss their options.

* open the ‘Move summary’ dropdown in the claimant’s record on the Move Service
* select the ‘Give more time’ option next to the claim by date

You will be presented with a screen showing the claimant’s current claim by date and their extension details.

* under ‘Reason for extension’, select ‘Claimant requested’
* in the free text box, record:

	+ the reason the claimant thinks they need an extension
	+ how long the claimant feels they need to make their claim
	+ how they are planning on making their claim to Universal Credit
	+ any support provided / offered to the claimant to help them claim

Where the claimant has already had an extension, you must also record the reason why they did not make a claim during their first extension period.

* select ‘Confirm’

Go to 1.18

1.17: Take the following action:

* explain to the claimant that you are going to transfer them to a different team who will be able to help them make their claim over the phone

If the claimant is unable to complete the phone claim straight away, ensure the claimant makes a note of the following Universal Credit helpline details:

Telephone: 0800 328 5644
Textphone: 0800 328 1344
[**Relay UK(link is external)**](https://www.relayuk.bt.com/) (if you cannot hear or speak on the phone): 18001 then 0800 328 5644
British Sign Language (BSL) [**video relay service(link is external)**](https://connect.interpreterslive.co.uk/vrs?ilc=DWP) if you’re on a computer - find out how to [**use the service on mobile or tablet(link is external)**](https://www.youtube.com/watch?v=oELNMfAvDxw)
Welsh language: 0800 328 1744
Monday to Friday, 8am to 6pm

* ask the claimant if they have any further questions specifically relating to their move to Universal Credit before you transfer them as the other team may not be able to answer them
* answer any additional questions the claimant may have
* transfer the claimant to the National UC Telephony team who will take their claim by phone
* add any relevant information to the ‘History’ section of the Move service

End of process

1.18: Explain the following to the claimant:

* based on the information they have given us; we can give them some additional time to make their claim to Universal Credit
* their new deadline date for making a claim is DD/MM/YYYY

The claimant’s new deadline date can be found by checking the ‘Claim by date in the Move service. This was automatically calculated when you entered the extension details.

* they will receive a letter in the next 2-3 business days with details of their deadline extension and the new date by which they need to claim Universal Credit
* their current benefits will stop on their new deadline date, so it is important that they make their claim
* if they need any further support, they should make contact using the telephone number on their letter
* if think they will have difficulty making a claim by their new deadline date, they must make contact using the telephone number on the letter **more than 1 week**before their deadline

Ask the claimant if they have any further questions or need any more support.

* answer any questions that the claimant may have
* end the call
* if there is any relevant information that you did not record in the free text box on the Move Service, record this in the ‘History’ section of the Move service

A ‘Notify claimant of new claim by date’ to-do will now have automatically generated within the claimant’s record on the Move Service.

Go to section 2.

Section 2: Notifying the claimant of their new claim by date

* open the ‘Notify claimant of new claim by date’ to-do and complete all of the necessary steps

End of process.

**Version control** *(record details of updates to guidance or key sign off for each version)*

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| --- | --- | --- | --- | --- |
| **Date** | **Version number** | **Comments/changes** | **Author** | **Reviewed by** |
| 13/02/2023 | V0.1 | First version of product drafted. | Callum Shooter |  |
| 15/02/2023 | V1.0 | Published | Callum Shooter | Christopher Dawson Olu OmotosoVicky DyerJoanne MurrayHannah Wright |
| 04/05/23 | V1.1 | Steps 1.17 and 1.18 updated to reflect agents should be adding notes to ‘History’ in the Move service, rather than the spreadsheet. | Natalie Brown | Callum Shooter |
| 04/05/23 | V2.0 | Published | Natalie Brown |  |
| 10/05/23 | V2.1 | Step 1.1 amended to say “Check the Move Service history notes to see if there is any additional information to support your discussion with the claimant. If the claimant was issued a migration notice before 3rd May 2023, there may also be some relevant notes on the 'Move to UC migration' spreadsheet.” | Natalie Brown | Callum Shooter |
| 10/05/23 | V3.0 | Published | Natalie Brown |  |