



contact *For families  
with disabled children*



# Managed migration to Universal Credit

Derek Sinclair

Senior Parent Adviser

Contact's Family Finance Team



# Aims of the session

- » Know what to do when you receive a managed migration notice
- » Understand important deadlines for claiming Universal Credit under managed migration
- » Understand what transitional protection is and who qualifies
- » Understand what is expected of you when you claim Universal Credit



# Timings and Questions

As there are so many attendees, it is not practical for verbal questions to be taken, therefore you will all remain 'muted' throughout. We also suggest that you switch off your camera as this will help with connectivity and protect your privacy. This session will be recorded.

If at any point you have questions, please use the chat function on your Zoom tool bar on your screen. This will allow you to type your question in to the chat function to submit your queries.

We will select as many relevant questions to answer as time allows, if similar questions are received we will condense these where possible



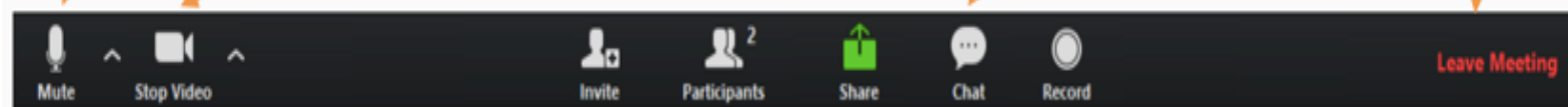
You can mute and unmute yourself.

Turns your camera on and off.

Click here to see who's currently in the training. It gives you various icon options too.

This will open the chat. You can ask questions and comment in chat.

If you need to go...



The ^ allows you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio settings if you're having trouble.



# Q & A

- We may not be able to answer all of the questions raised during the webinar. We will summarise, any common themes or questions and post these, along with answers, as part of a news story on the Contact website and social media channels later this week.

Towards the end of the webinar I'll pop the link to a questionnaire into the chat, please take the time to complete this as this will assist with future online training events



# What is Universal Credit

- New means tested benefit for people of working age
- Supposed to stream-line and simplify the benefits system
- Single monthly payment (in arrears) that includes money to cover rent charges.
- The amount of UC you get depends not only on your income but on your family circumstances and any rent costs.
- Initially only applied to new claimants but since 2023/24 it is being rolled out to replace existing means tested benefits and tax credits claims – this process is known as managed migration



# What benefits does UC replace?

There are 6 ‘**legacy benefits**’ that are being replaced by Universal Credit –

- » Child Tax Credit
- » Working Tax Credit
- » Income Support
- » Income-related Employment and Support Allowance
- » Income-Based Jobseeker’s Allowance
- » Housing Benefit – **some exceptions**





# What benefits are continuing

.Everything else:

- » Carer's Allowance
- » Disability Living Allowance and Personal Independence Payment
- » Child Benefit
- » New-style and Contribution based Employment and Support Allowance
- » Contribution-based Jobseeker's Allowance
- » Council Tax Support



# Moving onto Universal Credit

There are three ways in which you might move from legacy benefits to Universal Credit –

- » Volunteering to claim
- » Moving because you have a change of circumstances i.e. Natural Migration
- » Moving because the DWP ask you to - Managed Migration

Whichever way you claim Universal Credit, your old benefit claims will stop at the point you submit your new claim. You cannot return to your claim for legacy benefits even if you are much worse off on Universal Credit.



# Managed Migration

- » This is where you are told by the DWP that your old legacy benefits are due to end and you must claim Universal Credit by a deadline date
- » 60,000 people per month are currently being moved to Universal Credit under this system.
- » Provided you claim before the deadline given, you will be eligible for Transitional Protection to ensure you are no worse off when you first claim UC.
- » Transitional protection only applies to you if you claim after receiving a managed migration letter and within certain deadlines.
- » Not normally transitionally protected if volunteer to claim UC or move via natural migration



# Managed migration timetable

**From 2023/24** – tax credit only claimants

**From April 24**

- Income Support
- Housing benefit in combination with tax credits

**From July 24**

- Housing benefit only
- Income related ESA in combination with tax credits

**From Sept 24**

-income based job seekers allowance only

**From Autumn 24**

-income related ESA only and income related ESA in combination with housing benefit



# What happens when I'm selected for managed migration

- » You will receive a 'managed migration notice' telling you that your legacy benefits are ending and that you will need to claim Universal Credit
- » No-one is moved onto UC automatically – you will need to make a claim
- » Your notice will specify a deadline day when your legacy benefits will start to end - 3 month window within which to make a claim for UC.



PETER PATEL  
1 TEST ROAD  
TESTINGTON VILLAGE  
TEST TOWN  
NORTH TESTSHIRE  
TE1 2ST

Telephone:  
0800 169 0328  
8am to 6pm  
Monday to Friday

[www.gov.uk/dwp/](http://www.gov.uk/dwp/)

Your Ref:  
H2JR-HL5W-S1D1

6 April 2024

## You need to claim Universal Credit

You must claim by 7 July 2024 to keep receiving financial support

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### Universal Credit Migration Notice

Dear Peter Patel

You will soon stop getting the following benefits:

- Child Tax Credit
- Housing Benefit

You must claim Universal Credit by 7 July 2024 to keep receiving financial support.

### How to claim Universal Credit

If HMRC have recently asked you to renew your tax credits, you must do this before you make a claim. This will make sure you get the right amount of Universal Credit.

Go online to claim Universal Credit: [www.gov.uk/dwp/move-to-uc](http://www.gov.uk/dwp/move-to-uc)

If you cannot claim online, call the Universal Credit Migration Notice helpline for free on **0800 169 0328**.

Your tax credits award will end from the date you make your Universal Credit claim.

Your other benefit payments will end 2 weeks after you make your claim.



## How to get help

- call the Universal Credit Migration Notice helpline for free on **0800 169 0328**
- visit the Universal Credit website: **[www.gov.uk/dwp/move-to-uc](http://www.gov.uk/dwp/move-to-uc)**
- visit your local jobcentre

You can also call us for free on **0800 169 0328** if you:

- need more time to claim
- are not the person named on this letter
- do not intend to claim Universal Credit

For free, independent and confidential help, call the Citizens Advice Help to Claim service on **0800 144 8444** or go to their website: **[www.citizensadvice.org.uk/helptoclaim](http://www.citizensadvice.org.uk/helptoclaim)**

Check who can help you in your local area at: **[advice.local.uk](http://advice.local.uk)**

## How much you will get

Most people will be entitled to the same amount or more on Universal Credit. If the amount you are entitled to on your existing benefits is more than you would get on Universal Credit, a top up is available. This is called transitional protection. If your circumstances change before you make your claim, this may affect the amount you may get.

## If you live with your partner

You will both need to claim Universal Credit by the same deadline. You must make a joint claim for your household, even if your partner is not eligible for Universal Credit.

## If you have already made a claim

Ignore this letter if you have already made a claim for Universal Credit.

Yours sincerely,

Universal Credit

This is a migration notice issued under regulation 44 of the Universal Credit (Transitional Provisions) Regulations 2014 (MNS1). It entitles you to transitional protection, provided your circumstances do not change before you claim Universal Credit.

# Receiving a managed migration notice

- » Can be issued at any time
- » Couples should each receive a notice
- » Names the existing legacy benefits that will be stopping and tells you that you must make a claim for UC;
- » Specifies the day by which the UC claim must be made – this is known as **your deadline day**
- » Notice can be cancelled if issued in error or if not in the best interests of the claimant





# Cancellations and families with a 19 year old in FT non advanced education

- » DWP policy – not to send MM notices to families who have a 19 year old in FT non advanced education
- » However, DWP often unaware what age your children are – so notices are regularly sent in error
- » You can call UC Managed Migration Notice Helpline on 0800 169 0328 and ask that notice be cancelled and reissued at a later date
- » This DWP policy around 19 year olds is likely to be scrapped – so seek up to date advice if watching a recording of this webinar



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# Deadline day

This is the day that your legacy benefits will begin to end if you have not already claimed UC earlier:

**If you claim UC before your deadline day, then your UC starts on the day that you claim and**

- Your tax credits stop on the date you claim UC
- Any other legacy benefits run on for a further 2 weeks

**If you claim on or after your deadline day**

- Your tax credits stop on your deadline day;
- Any other legacy benefits run on for a further 2 weeks

Claiming by deadline day means you are eligible for transitional protection



# When is the best time to claim UC?

- » After receiving managed migration notice but before your final deadline date
- » Have a 3 month window
- » Timing a claim may depend on any likely changes of circumstances
- » If paid tax credits 4 weekly may wish to claim just after a tax credit payment
- » Best to avoid dates near pay days
- » Ideally get your benefits checked before you claim to make sure there are no underpayments



# Deadline Day - extensions

- » Deadline day can be extended if there are good reasons
- » Make request via UC Managed Migration Helpline
- » Must ask before Deadline Day
- » Usually granted for a further month
- » May be extended more than once
- » No right of appeal against refusal to extend deadline
- » Looked after children – speak to Contact



# Looked after children

- » Under UC there are no payments for looked after children (LAC)
- » Also no transitional protection to make up for loss of child elements previously paid under tax credits
- » Families with LAC at risk of being much worse off on UC
- » DWP have agreed that where Contact provide details of a family with a LAC they will extend MM deadline month by month until Feb 2025
- » Phone Contact Helpline on 0808 808 3555 asap if this applies to you.



# Enhanced support for vulnerable claimants

All claimants sent a MM notice receive 2 reminders at weeks 7 & 10. But if on IS or income related ESA extra steps are taken.

If you have not claimed UC by week before deadline date (week 12) you get a text telling you that the DWP will be phoning you. DWP try to call 3 times at different days and times to find out if extra help needed.

- » If DWP unable to make contact, they will automatically refer an ESA claimant for a home visit.
- » If on IS, they will check system for evidence of vulnerability (e.g. history of mental illness, abuse, homelessness) and if evidence of vulnerability refer for a home visit.

If referred for home visit, deadline day will be automatically extended to allow for this to happen



# What happens if I miss my deadline day?

- » If no claim made by deadline day your legacy benefits will be stopped
- » However, you have a further month to claim UC – this is known as your **final deadline day**
- » So long as you claim by final deadline day your UC Claim will be automatically backdated and you remain eligible for transitional protection payments

## Example

If your deadline day is 5<sup>th</sup> October, the final deadline is 4 November. So long as you claim by 4 November you are eligible for transitional protection, but 5 November would be too late.





# What happens if I miss my final deadline day?

- » Legacy benefits end from original deadline day
- » Can still make a claim for UC at any point – but not backdated
- » Not eligible for any transitional protection if worse off



# When will I get my first UC payment?

- » UC is paid monthly and in arrears
- » You should receive your first UC payment 5 weeks after claim UC
- » If you claim after your deadline day you will face a longer wait between your legacy benefits ceasing and first UC payment
- » If you will struggle to manage financially during these 5 weeks you can apply for an 'advance payment'
- » Advance payment is a loan – to be repaid by deductions from UC payments



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# UC and families with disabled children

- Child disability addition can be lower under UC than under legacy benefits
- A disabled parent will either get a carer element or adult disability element but not both



# UC and families with disabled children

	24/25 legacy benefits	24/25 Universal Credit	Weekly difference	Annual difference
Higher Disabled Child Addition	£112.21	£112.21	nil	nil
Lower Disabled Child Addition	£80.01	£35.95	- £44.06	- £2291.12



# Transitional Protection

There are 3 types of transitional protection

- » Student transitional protection
- » Transitional capital disregard
- » Transitional element



# Transitional capital disregard

- » Only applies if on the day you migrate you are a tax credits only claimant and have capital above £16,000
- » Normally can't get UC if capital above £16K. But that capital can be ignored for 12 months.
- » Capital between £6K and £15,999 still counted – leads to reduction in UC payments
- » If you start to have capital above £16K after migration – your UC stops
- » If you are getting UC with capital disregard and capital drops below £16K and then increases back above £16K – UC stops



# Transitional element

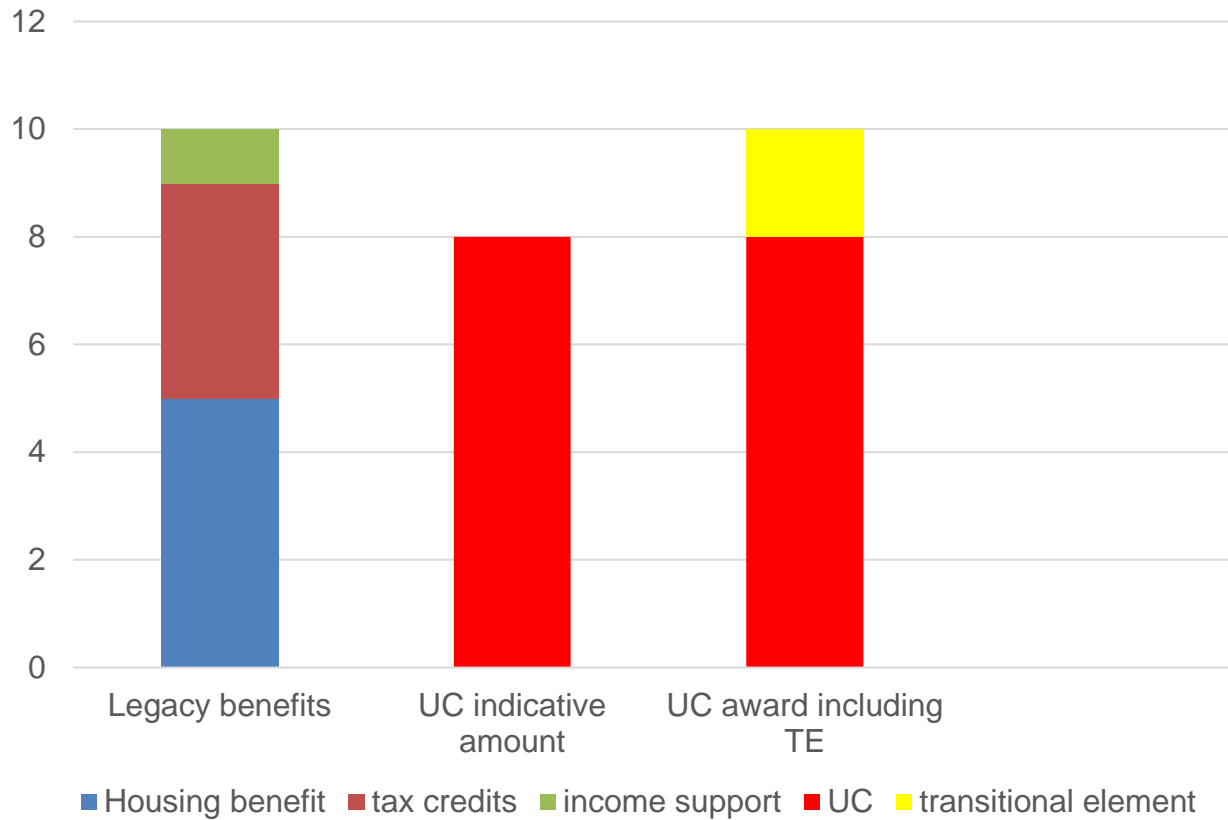
- » An extra UC payment made to top-up your UC award if it less than what you were getting in legacy benefits
- » To be eligible must claim under managed migration rules i.e. after receiving a MM notice and before **final deadline date**
- » DWP compare your total legacy benefits with an indicative UC amount
- » If UC indicative amount is lower than your total legacy benefits you will receive the difference as a transitional element





# Transitional element

» How transitional element is calculated



# Issues with transitional element

Rules are very technical – sometimes families get a higher transitional element than expected, sometimes they get less

Some families are not transitionally protected e.g. families with a child who has looked after status, 16-19 year olds temporarily out of education

Transitional element does not increase but it can reduce and even stop



# What brings transitional protection to an end

- » Couple separate or new couple forms
- » You stop getting UC for 3 consecutive months due to your earnings
- » Your earnings drop below certain levels for 3 consecutive months
- » Your UC stops for any other reason other than earnings e.g. capital goes above £16,000, go abroad etc.



# What erodes your transitional element

- » Any increase in any other part of your UC award other than childcare costs – including the annual uprating in benefits
- » Any award of an extra UC element

## Example

Fatima and Mo have one disabled child. They get Universal Credit that includes a transitional element (TE) of £300 pm.

- In Nov their housing association increases rent by £30 pm. Because her UC rent element increases by £30, her TE drops to £270.
- In April, their other UC payments are increased by £60 due to inflation. As a result of this increase her TE drops to £210.
- In July, Fatima and Mo have a new baby. They start to receive an extra child element of £287.92. Their TE is reduced to nil.



# Transitional protection

- » *Once transitional element is reduced to nil it cannot be added back into any future award – even if your circumstances change at a later date*
- » *Your transitional element cannot be increased – even if you start to get lower amounts elsewhere in your UC award*

*So – while it ensures you are no worse off at the point you are transferred but reality is that you will be worse off over time due to inflation and other changes.*



# Q&A Session

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# Making a UC claim

Universal Credit is usually claimed and managed online. You can start the claim here -

» [Universal Credit: How to claim - GOV.UK \(www.gov.uk\)](https://www.gov.uk/universal-credit/how-to-claim)

If you are unable to manage an online claim, you can apply through the Universal Credit helpline.

» **0800 328 5644** (Welsh language: 0800 328 1744)

» Relay UK (if you cannot hear or speak on the phone): 18001 then 0800 328 5644

» British Sign Language (BSL) video relay service if you're on a computer - find out how to use the service on mobile or tablet

» Textphone: 0800 328 1344

Monday to Friday, 8am to 6pm



# Information you will need

Need to set up a UC account before making a claim. You'll need to provide your personal details and information including name, address and national insurance number.

You will then need to make a claim for UC and provide further details about your circumstances.

- » Information about your work and employment including self-employment
- » Your household including your partner and children and any disability benefits that they receive
- » All the benefits you are claiming
- » Any other income that you receive
- » Details of your savings, capital including property, investments and the money you have in all of your bank accounts. You will need to provide the last 3 months of bank statements and accounts.
- » Details of your housing, including a copy of your tenancy agreement
- » Information about your childcare costs if you are claiming for help with this.





# Your UC account

Once you have claimed UC you will have access to an online account which includes -

- » **A journal** – this is used to send and receive messages with the jobcentre. You will not usually receive paper letters, but e-copies of these will be attached to notes on your journal.
- » **To do list** – A list of tasks the jobcentre expects you to carry out. This can include work searching and preparation, attending appointments with the jobcentre and providing information the jobcentre ask for. You can be sanctioned if you do not do these or explain why you are not able to.
- » **Payments** – You will receive a monthly statement confirming the amount of money you are due to receive. This will be available a few days before your payment is due.
- » **Notify of changes** – This section includes all the changes you can notify UC of, including if you or your child is awarded a disability benefit, if your young person leaves education or if your childcare or rent costs change.



# Interview with Job Centre staff

Once you have submitted your claim you may be asked to attend an interview with local jobcentre staff. There are three main purposes to this –

- » To verify your identity
- » To confirm your work commitments
- » For the jobcentre to gather any further information they may need.



# Conditionality and carers

Most UC claimants expected to look for work as a condition of getting UC but not everyone

You are exempt from all work-related conditions if you are someone who is eligible for Carer's Allowance or carer support payment in Scotland (whether or not you claim it).

You are also exempt if the only reason that you are not eligible for CA/CSP is because your earnings are too high.



# Conditionality and couples who care for the same disabled child

Only one person can be treated as eligible for Carer's Allowance for the same disabled child

This means that where a couple look after the same disabled child only one of them can be automatically exempt from job seeking as a carer.

However, under Reg 89 (1)(b) UC Regs UC staff have discretion to exempt a 2<sup>nd</sup> FT carer from work related conditions if agree not reasonable to expect them to look for even part-time work.



# Extra help with managed migration

## **DWP**

Universal Credit Managed Migration Notice Helpline: **0800 169 0328**

Universal Credit Helpline: **0800 328 5644**

Northern Ireland: **0800 012 1331**

## **Citizens Advice Help to Claim service**

England : **0800 144 8 444**

Scotland : **0800 023 2581**

Wales : **08000 241 220**



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# Contact

Helpline: 0808 808 3555

[www.contact.org.uk](http://www.contact.org.uk)



# Thank You!

Thank you for attending with us today

A link to a questionnaire will be put in the chat.

Please take the time to complete this it will help us plan future online training events including other topics you would like to see

The recording of this Webinar, presentation and questions will be published on Contacts' website next week







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