

Award period and reviews

340. The Case Manager (CM) decides the period of an award based on all the evidence including the advice from the Healthcare Professional (HP). The CM also decides if a review or ‘planned intervention’ will apply and when the review date should be set for. This should also be based on all the evidence including the claimant questionnaire, (PIP2) other evidence provided and advice from the HP.

341. A review point or ‘ PIP Award Review’ is an opportunity to look at entitlement at set intervals to ensure the claimant continues to get the right amount of Personal Independence Payment (PIP). The review point selected should be based on the claimant's individual circumstances.

342. If the CM decides a PIP Award Review is appropriate based on the evidence and advice they record the review date in the Personal Independence Payment Computer System (PIPACS) when the decision is made. The CM sets the end date of the award for a year after the planned intervention date this is to allow enough time for the intervention to take place.

343. The award period options for the CM to consider and decide are:

Short fixed term award, (SFT) with or without a PIP Award Review, these can be for a minimum of 9 months and up to a maximum of two years.

Longer fixed term award, (LFT) the CM decides the review (planned intervention) point and then sets the end date of the award for 12 months after the review date.

Ongoing award, where any change is very unlikely and with a planned intervention date no more than 10 years from the award date.

344. The HP gives their recommendations and justification for the recommended review date in their consultation report. The review questions for the HP are in the report forms and also in the ‘Recommendations’ screen or page of the PIPACS assessment questionnaire.

345. The HP answers one of the following two questions in the report about review either giving a review period or stating review isn’t required.

Recommendations

346. The review period question for the AP is:
‘Based on the claimant’s likely future circumstances, it would be appropriate to review the claim in’: ‘Years and Months’ fields

Date the HP gives recommended date from

347. The recommendation year and month given by the HP is taken from the date of the consultation. If the assessment is paper-based this would be from the date the HP completes the assessment report.

348 The review not required option is:

‘I consider there to be no requirement for future reviews of this claim as significant change is unlikely’

349. If the HP has answered ‘Yes’ to the review not required question above this indicates an ongoing award may be appropriate. The explanation from the HP should give further detail to support the HP’s answer and should be taken into account by the CM when deciding the award period.

350. The consultation report form also contains the further question for the HP:
‘It is likely that the functional restriction identified in this report will be present at the recommended point of review’

351. For the above question the options for the HP are: Yes, No, Not Applicable (no restriction present) and the HP will, select:

‘Not applicable’, if they consider the claimant either has few or no functional restrictions

‘No’, if they consider the restrictions may not still be present at the time any award made by the CM is likely to end

‘Yes’, if they consider the restrictions will stay the same or deteriorate.

Awards reviews and end of award

Short fixed term award

356. A short fixed term award (SFT) with or without a planned intervention may be appropriate for some claimants. To decide which type of award is appropriate the CM should consider all the available evidence.

Note the HP will always provide a review period unless the HP considers the claimant’s condition is stable and highly unlikely to improve or deteriorate. The CM may consider an ongoing award in such cases.

357. The CM would consider a short fixed term award without a review may be appropriate if the HP:

answers No to the question - ‘It is likely that the functional restriction identified in this report will be present at the recommended point of review’ and indicates in the report the claimant’s limitations would be expected to improve to such an extent that they are unlikely to have the degree of difficulty in activities that would result in entitlement at the end date of the award

358. A SFT award without a planned intervention stops when the award ends. If the claimant considers they still have difficulties with daily living and mobility, they will need to make a new claim.

359. A SFT award with a planned intervention would be appropriate where the HP: answers Yes to the question “It is likely that the functional restriction identified in this report will be present at the recommended point of review” and recommends a review date of two years or less.

360. The report should give reasons for the HPs recommendations and if the above applies, unless the evidence is contradictory or conflicting a SFT with or without a planned intervention as appropriate should be made.

For example:

Example 1:

Claimant assessment consultation on: 07/06/2013

HP recommends review in one year

HP answers No to question ‘It is likely that the functional restriction identified in this report will be present at the recommended point of review’

Report clearly indicates that in 9 months to a year the claimant will have improved to the extent that they will have either no functional limitations or very low level.

The CM makes a SFT award for a year from date of consultation.

The end date of the award will be recorded as 06/06/2014

Example 2

Claimant assessment consultation on: 07/06/2013

HP recommends review in one year

HP answers Yes to question ‘It is likely that the functional restriction identified in this report will be present at the recommended point of review’

Report clearly indicates that the claimant’s condition may improve to some extent but there may or may not be any effect on their functional limitations.

The CM makes a SFT award with a planned intervention date set for a year after the consultation. That is they set the review (PI) date for one year and add 12 months on to this.

This gives an planned intervention date of 06/06/2014 and end date of award as 06/06/2015

361. If there are any issues with the report or evidence the CM should try to resolve them via the Quality Assurance Manager (QAM) with the HP.

Longer fixed term award

362. Longer fixed awards with planned interventions are appropriate if it is likely the claimant’s level of restriction in daily living and mobility activities may change at a later stage. That is the claimant may have some improvement or deterioration that could result in a change in the rate of PIP entitlement.

363. For any decision on period of award, the CM should decide as to whether a longer fixed term award (LFT) is appropriate based on all the evidence, including the claimant questionnaire, any other evidence provided and the HP recommendations and advice.

364. A LFT award would be appropriate where the HP: indicates the functional restrictions are likely to be present at the recommended point of review and also recommends a review date of more than 12 months from the date of the consultation.

365. The HP report should include reasons for the HPs recommendations.

366 The CM should take appropriate action to clarify anything in the HPs recommendation or other evidence that is unclear, or if there has been any relevant evidence received at DWP the HP may not have seen

Ongoing award

370. Ongoing awards are appropriate where the claimant's restrictions on daily living and or mobility are unlikely to change significantly. If the HP considers no significant change is likely and no requirement for future review it indicates an ongoing award may be appropriate.

371. If the HP considers the claimant's restrictions will continue but are likely to deteriorate they would usually advise on an appropriate review period rather than no review.

372. If the CM considers all the evidence and advice and decides an ongoing award applies, they don't record an end date in PIPCS.

373. The planned intervention date will depend on the particular circumstances of the case and the CM will decide the most appropriate date based on the evidence and the advice from the HP. The date will be set from the consultation date. A date may be set for less than 10 years but in any case the planned intervention date should be no longer than 10 years following the consultation date

End of Award

374. PIPCS automatically issues an 'end of award' notification to the claimant (or appointee if appropriate) 14 weeks before the end of award.

375. This advises the claimant their award is ending. It is issued for all cases reaching the end of an award whether or not the award has had a planned intervention or any type of review at any point.

376. The end of award notification advises the claimant how to claim if the claimant considers their needs have continued and it also advises of other benefits.

377. For exportability cases, that is, those identified in PIPCS with a 'Competent State' marker there is a tailored notification.

Background

1. When making a decision to award PIP the Case Manager (CM) will decide the period of award based on all the evidence including advice from the Health Professional (HP). The CM will decide whether a review will apply and the date of the recommended review.

Please note: Although Interventions have now been renamed to Award Reviews any output from the system will still refer to Interventions

2. The Award Review rules are applied on determining the recommended review date.

3. PIPCS will check if CoC Award Review is on going. If so, the Award Review is no longer required.

4. PIPCS also checks to see if PIP is in payment.

- if PIP isn't in payment PIPCS will defer the Award Review until payment is reinstated.
- if payment of PIP isn't reinstated before the award end date the Award Review is not required and no further action will be taken.
- if payment is reinstated Award Review activity will start .

PIP Award Reviews record created

5. If PIP is in payment, PIPCS will automatically create an Award Reviews record in the Create Intervention screen. The screen displayed is as follows:

- The Received date This field will be set to the date the Award Reviews is created;
- The type This field will be set to 'Award Reviews';
- Requested By This field will be set 'Secretary of State';
- Part 2 required This is a drop down menu and will be 'yes';
- Conclusion This is a drop down menu and will default to blank. Values set by PIPCS when the User completes the determination are:
 - i. Changed; and
 - ii. Unchanged;
- Comments if appropriate.

6. From 1 February 2016 Award Review (Planned Interventions) tasks generated by PIPCS will be automatically assigned to the Case Manager (CM) with an Award Reviews skill set.

Validation

7. PIPCS will not create Award Reviews if there is an open intervention in progress.

8. PIPCS will automatically issue a PIP2(UI) and PIP1021 covering letter and sets a wait time of 40 calendar days for its return, after 19 days PIPCS automatically issues a reminder.

PIP2(UI) not returned - additional support identified

9. PIP2(UI) not returned within 40 calendar days, PIPCS will identify claimant's requiring Additional Support (AS) and create a task to the Assessment Provider (AP) to consider a face to face assessment.

10. PIP2(UI) not returned no AS is identified, PIPCS will automatically issue notification PIP.1025. This advises the claimant a PIP2(UI) has not been returned and they need to return it

PIP2(UI) not returned – PIP not in payment

11. PIP2(UI) not returned within 40 calendar days and PIP is not in payment, an automatic task is created for the CM to consider deferring the task to await reinstatement of payment. If payment is unlikely to be reinstated before the end of award date and the End of Award notice has been issued, the claimant will need to contact PIP if they want the award to continue.

PIP2(UI) process without an extension request

12. The claimant is given 1 calendar month from the day after the date of issue to return the PIP2(UI). For example, the PIP2(UI) covering notification PIP.1021 issued 03 February asks the claimant to return the PIP2(UI) by 04 March.

13. However, PIP2(UI) return date is automatically set by PIPCS for 40 calendar days from the date of issue. After 19 calendar days PIPCS will generate and issue the automatic reminder notification PIP.1025 if PIP2(UI) hasn't been returned.

14. Task timers for cases where the PIP2(UI) is issued manually will not be set automatically and users must manually set a deferred task. For example, any of the clerically issued PIP2(UI).

15. No AS identified and PIP2(UI) not returned within 40 calendar days, PIPCS will generate an automated task for the CM to make a negative determination and supersede the current entitlement decision. You must issue a manual PIP notification PIP.7021 to notify the claimant where you have made the decision to supersede and disallow. You should create a Communication Record.

16. Claimants needing AS will have been identified from the PIP1 or subsequent claimant contact and a flag recorded on PIPCS. These cases are referred to the AP without the completed PIP2(UI) at the 40 calendar day trigger point.

Claimant requests more time to return PIP2(UI) - 2 week extension provision

17. If the claimant asks for more time to return PIP2(UI), the telephony or processing agent can extend the PIP2(UI) return date by 2 weeks (14 calendar days) where the claimant has not previously had an extension. Note: This guidance for extending the return date of PIP2(UI) applies to all versions of the PIP2:

- PIP2, PIP LP, PIP2 NI and PIP2 NI LP – all issued by Extream
- PIP2 clerical version for issue in exceptional circumstances (for example no NINO claims)
- PIP2(UI) (clerical issue)
- PIP2 VO for visiting officers (clerical issue)
- PIP2, the Welsh and LP versions (clerical issue).

18. The telephony agent will:

- check PIPCS ‘Timers’ tab to ensure this is the first request for more time;
- add 14 calendar days to the original return date by extending the timers, this calculates the new return date but will not be displayed. . This action automatically resets the PIP2(UI) return date and resets the disallowance trigger date to 54 calendar days;
- advise the claimant they now have another 14 calendar days from the date on their letter. The agent may need to establish the original return date from the claimant and add 14 calendar days should the claimant ask for the new return date. The 40/54 calendar day trigger point must not be mentioned.;
- advise the claimant any reminder will show the original return date and this date should be ignored; and
- If the claimant provides a reason for the extension record it in the ‘Reason’ notes field. Providing or recording a reason for a 14 calendar day extension is not mandatory.

19. PIPCS does not produce a notification and there is no requirement to issue a clerical one - See: ‘Enquiry Line’ guidance - Request for PIP2 UI form 2 week extension’ and ‘Reset the timers for return of PIP2’ guidance.

Extension requested of more than 14 calendar days

20. If the claimant requests an extension of more than 14 calendar days or they’ve already had a 14 day extension, the CM on behalf of the S of S needs to consider if it’s ‘reasonable’ to allow more time.

21. The claimant must provide reasons why they need more time to return PIP2(UI). The telephony agent will create a CAMLite ‘To Do’ task for the CM and record the reasons provided by the claimant in the ‘To Do’ task notes field.

22. You may also receive a PIPCS task created by non-telephony ‘back office’ processing staff who received the extension request via an outbound call or letter.

Case manager considers if it is reasonable to allow more time

23. On behalf of the S of S the CM will consider if it's 'reasonable' to allow more time for the claimant to return the PIP2(UI)

24. You may allow as much additional time as you consider is reasonable. There is no definition in law as to what is reasonable but to help, you should ask the claimant why they need more time to return PIP2(UI). The test of 'reasonable' is an ordinary one and isn't defined or limited, so this is very much for you to consider.

25. It depends entirely on the individual circumstances of each case and may be something outside either the claimant's or the department's control.

26. If the reasons recorded by the agent in the CAMLite 'To Do' task notes field aren't sufficient to help you decide, you will phone the claimant, making 3 attempts at different times over a two-day period. When a Case Worker or Case Manager attempts to contact a claimant by outbound telephone call and fails to make contact the sending of a manual SMS text message should be considered, notifying the claimant that the DWP has attempted to contact them and advising them that DWP will attempt to call them back or advising the claimant to.

Record

27. You don't need to ask for or consider the claimant's original reasons for requesting the original 14 calendar day extension. If you can't contact the claimant by phone you must:

Step Action

- 1 issue general enquiry clerical letter PIP.3033
- 2 create a Communication Record
- 3 set a task in PIPCS for 14 days for the reply

Management

28. Claimants are allowed 1 calendar month and 1 day to complete and return the PIP2(UI). A 14 day extension may also be granted if requested.

29. If the claimant can't return PIP2(UI) within the 1 calendar month and 1 day plus any 14 calendar day extension, you need to carefully consider if a longer period is reasonable in the particular circumstances of the case.

30. The length of the extra time requested is also an important factor when looking at why the time already allowed isn't enough. The claimant could make further requests for even more time which you will also need to consider if it's reasonable, in the particular circumstances given.

31. The PIPCS trigger point for disallowance is set for 40/54 calendar days (rather than 1 calendar month and 1 day/1 calendar month and 1 day plus the 14 calendar days) to allow extra time for general postal and or internal DWP delays. You should therefore note that this reason is already allowed for.

Example A

32. The PIP2(UI) covering notification PIP.1021 dated 03 February asks the claimant to return the PIP2 UI by 03 March.

The 19 day reminder issued on 22 February prompts a request for more time on 25 February because the claimant was admitted to hospital as an emergency on 20 February.

A 14 day extension was granted by the telephony agent with a new return date of 17 March.

A second request for a further 14 calendar days to return PIP2(UI) was made on 13 March because the claimant had major surgery with subsequent complications and was not discharged until 11 March.

The difficulty in returning PIP2(UI) by 17 March was outside the control of both the claimant and the Department and so the extra 14 calendar days requested for return is reasonable.

Although there were a few days following discharge and the extended date of return, the claimant could not 'reasonably' be expected to complete and return the PIP2(UI) immediately on discharge, given the seriousness of their condition.

Note: - in these same circumstances, had the claimant's second extension request been for more than 14 calendar days then it could bring into question whether allowing more than 14 calendar days extra was in fact reasonable.

Example B

33. The PIP2(UI) covering notification PIP.1021 dated 03 February asks the claimant to return the PIP2(UI) by 03 March.

A request for more time was made on 18 February and a 14 calendar day extension was granted by the telephony agent, with a new return date of 17 March.

Reason for requested extension – extreme weather conditions on 05 February caused flood damage to property and the claimant moved to temporary accommodation until 16 February whilst repairs were completed.

A request for more time to return PIP2(UI) is made on 14 March – reason given on returning home it took some weeks to get the house straight so the claimant didn't get round to completing the form.

This is outside anyone's control and was a cause for some of the delay. However, the continued post-crisis delay by the claimant was a long one and overall, allowing a further period for claiming may not be reasonable. The claimant had from 18 Feb to 17 March to complete and return PIP2(UI).

Example C

34. The PIP2(UI) covering notification PIP.1021 dated 03 February asks the claimant to return the PIP2(UI) by 03 March.

A request for more time was made on 18 February. The reason given was the claimant needed help to complete PIP2(UI) and the earliest appointment with Citizens Advice

was for 18 March. The claimant also said it would then take a few days for the completed form to be returned.

This request was for more than 14 calendar days so the telephony agent created a CAMLite task to the CM to decide if the request for extra time was reasonable. In this case the CM decides the request is reasonable and allows the claimant until 25 March to return the PIP2(UI).

35. Given the nature of PIP and the requirements of the form, extensions in these instances should be considered reasonable. There may also be further extensions: For example: appointment cancelled, as the advice worker unavailable due to illness.

36. Requests to allow longer periods for the return of PIP2(UI) could be caused by other factors which you should consider. For example, there may be a postal dispute causing a delay in the return of PIP2(UI).

Case manager decides it is reasonable to allow more time

37. If you decide it's reasonable to allow more time for the return of PIP2(UI) than the 1 calendar month and 1 day plus any 14 calendar day extension, record details of the request in PIPCS.

38. You will need to reset the timers in the 'PIP Application Case' screen. This ensures notification and disallowance triggers and/or tasks are moved forward to reflect the extra time allowed for extension.

Reset the Timers in PIPCS

Step Action

1 to navigate to the PIP Application Case select:

- 'Cases and Outcomes' tab from the PIPCS Banner
- 'Claimant Record' tab
- 'Application' tab
- 'PIP Application Case' link

See: Enquiry Line- PIPCS overview and navigation.

2 select the 'Timers' tab

'Timers' provide a description of the automatic timer set following the issue of the PIP2(UI).

In the 'Timers' tab you can see a list of timers set against the case.

'PIP 2(UI) timer 40 days' is the duration of the timer and the deadline of the timer is a count down of number of days left.

You can view previous extensions and the reasons for them.

3 expand the timer by using the 'Arrow' button next to 'PIP2(UI) timer 40 days' to check if there has been a previous extension or not. The box is blank if no previous extension granted.

Note: If the PIP2(UI) has already had an extension you will see a panel with 'Days Extended' in it.

4 select the 'Action' button.

5 select 'Extend' from the drop down.

6 type the number of calendar days you have agreed to extend the return date by in the 'Days Extended' field

7 record the reason for extending the timer in the 'Reason' notes field for example '20 calendar day extension granted because...'. This will help telephony agent should the claimant phone.

8 select 'Save'

39. PIPCS will automatically reset the PIP2(UI) return date and the disallowance trigger but will not produce a notification about the extension. It won't show the new return date, you will need to calculate this yourself.

40. You should phone the claimant, recognised representative or unofficial representative to tell them your decision and the new return date. You must make 3 attempts at different times over a two-day period and create a Communication Record for each attempt. When a Case Worker or Case Manager attempts to contact a claimant by outbound telephone call and fails to make contact the sending of a manual SMS text message should be considered, notifying the claimant that the DWP has attempted to contact them and advising them that DWP will attempt to call them back or advising the claimant to call.

41. Where you contact the claimant, recognised representative or unofficial representative by phone, create a Communication Record.

You should:

Step Action

1. access the 'Notes Box' in the Communication Record
2. input the claimant's reasons for requesting an extension for the return PIP2 UI
3. input your reasons for accepting the request for more time is reasonable.

42. If you can't contact the claimant by phone send clerical notification PIP.1020 to tell them you've accepted their reasons and to give a new return date. You should create a Communication Record.

43. If PIP2(UI) is received after the 1 calendar month and 1 day plus any 14-day extension but before the 40/54 day task is triggered, the claim will still be tasked to the AP by PIPCS. Although the PIP2(UI) is technically late, we have received it before a lateness or negative determination decision.

44. Note: The 40/54 day timer is for internal administrative purposes only and there is no reason to inform the claimant of these dates.

45. If the PIP2(UI) was issued clerically a task is set to issue the reminder, return by date and the disallowance trigger. In these cases you need to defer the tasks to correspond with the new return by date

Case Manager decides it is not reasonable to allow more time

46. If you decide it's not 'reasonable' to allow a longer period than 1 calendar month and 1 day (plus any 14 calendar day extension already granted) to complete and return PIP2(UI), phone the claimant, recognised representative or unofficial representative to notify them of your decision. You must make 3 attempts at different times over a two-day period and create a Communication Record for each attempt. When a Case Worker or Case Manager attempts to contact a claimant by outbound telephone call and fails to make contact the sending of a manual SMS text message should be considered, notifying the claimant that the DWP has attempted to contact them and advising them that DWP will attempt to call them back or advising the claimant to call.

47. You need to be aware of the case timer and return by dates before you phone the claimant. If appropriate, the emphasis for the claimant should be on returning the PIP2(UI) as soon as possible if the 40/54 day timer hasn't been reached. Tell the claimant:

- you've looked at their reasons for needing more time but consider they're not sufficiently 'reasonable' to extend the time for returning PIP2(UI) further;
- their claim may be disallowed if the PIP2(UI) isn't received by the latest recorded return by date (This date is either the date on PIP.1021, if this is the first request for more than 14 calendar days, or that date plus any number of days extension already granted);
- who can provide independent help, where they can get more information and where they can phone to make a fresh claim should this claim be disallowed for non return of the PIP(UI); and
- if appropriate, you may tell the claimant a disallowance notification giving dispute rights will be issued when the return by date has passed and PIP2(UI) hasn't been received.

48. Where contact is made with a claimant, recognised representative or unofficial representative by phone or post, create a Communication Record.

You should:

Step Action

1. access the 'Notes Box' in the Communication Record
2. input the claimant's reasons for requesting an extension for the return PIP2(UI)
3. input your reasons for not accepting the request for more time

49. If you can't contact the claimant by phone send clerical notification PIP.1020 to tell them you don't accept their reasons. The notification tells the claimant what happens next and where to get help. You should create a Communication Record.

50. Your decision not to allow more time does not carry dispute rights. But any subsequent negative determination decision for non-return of PIP(UI) has dispute rights.

Negative Determination for non receipt of PIP2(UI) where an extension has been granted

51. When the 40/54 calendar day point (or other number of days has been considered reasonable) is reached and the PIP2(UI) hasn't been received. If AS is identified, PIPCS will automatically notify the AP PIP2(UI) has not been returned and further support is needed. PIPCS will create the assessment case and task it to the AP.

52. If AS is not identified PIPCS will create a task for you.

53. On receipt of the task, where good reason has not been established, access the Medical Evidence details page and note the following:

Step Action

1. effective date of change field

Note the effective date should be today's date

2. see the failure to supply information cluster

3. negative determination – if required

4. part 2 not returned – good reason accepted field. You should select 'no'

5. select 'save'

54. Once the changes to the evidence have been saved the system creates an 'In Edit' record. Once the record is successfully applied the relevant changes become active.

Validating evidence and applying evidence changes

55. You must now validate and apply the evidence (to make sure that it is correct) so the legislative rules can be run.

Accessing the Evidence screen to Validate changes

56. From the PIP case homepage, (application or integrated case) you will:

Step Action

1. select 'Case and Outcomes' tab at the top of the determinations page to open the case home page

2. select 'Evidence' tab to display the 'Evidence' dashboard

57. From the evidence dashboard you can select and view any evidence recorded to check.

58. You will:

Step Action

1. select 'Validate Changes' option from the action drop down menu

59. A dialogue box opens showing all the evidence and details. You should select 'save' to validate all the evidence. You should then close the dialogue box and return to the evidence dashboard.

Accessing the Evidence screen to Apply Changes

60. 'Apply changes' is a mandatory step which is needed to trigger PIPCS to activating all the evidence and later run the legislative rules. From the evidence dashboard you will:

Step Action

1. select 'in edit' evidence option from the navigation panel on the left
2. select 'Apply changes' option from the action drop down button that opens a dialogue box showing the evidence details
3. select 'save'

61. The action to 'Apply changes' will do one of two things;

- show error messages; or
- activate the evidence.

62. If further amendments are needed to any of the evidence screens you should make the necessary changes to the evidence before selecting 'apply changes' again to continue.

Checking eligibility

63. Once all the evidence is validated in PIPCS you must run the legislative rules against the information held.

64. Eligibility can be checked on a case at any time after the PIP application has been submitted in PIPCS. The eligibility rules are run on the evidence at the time a check is made. The result will be either 'eligible' or 'ineligible'

65. You should:

Step Action

1. select 'eligibility checks' tab. If previous eligibility checks have been run a list of previous eligibility will be displayed
2. select 'Check Eligibility' from the action drop down menu in the top right-hand corner. This opens a 'check eligibility' dialogue box. This displays all the available PIP claims for the case
3. tick 'Use Active Evidence only' checkbox if not already ticked

Note: an error message will display and the eligibility check will fail if there is no active evidence. If this is the case you'll need to return to the evidence screens to check, but validating the evidence and applying changes means the eligibility check fail shouldn't occur.

You should:

Step Action

1. tick the current PIP claim check box if not already ticked
2. select 'yes' to run the legislative rules and return the eligibility checks list

66. The legislative rules are now run and PIPCS will provide a detailed result of each rule and will show a result of ineligible.

67. You will issue clerical notification PIP 7021. To prepare the PIP 7021 you will require three dates to input into the notification. These are:

- the date the PIP2(UI) was sent to the claimant, PAB or CPAB;
- the date the department issued the reminder PIP 1025 notification; and
- the final date the claimant is no longer entitled to PIP.

68. You will prepare two copies – one for the claimant or authorised person. The other must be marked ‘copy’ and sent to the Document Repository System (DRS) for document retention, create a Communication Record.

69. If there is a Motability agreement present, you must create a manual task for the Motability team to notify MOPs.

70. PIPCS will then automatically close the PIPCS record.

PIP 2(UI) received case referred to the AP

71. When the PIP2(UI) is received the Mail Opening Unit (MOU) will scan it into DRS and PIPCS will refer the case direct to the AP work Queue for Assessment action.

72. Where PIPCS indicates the claimant needs AS and the PIP2(UI) isn't returned after the 40/54 days (or agreed extended period) an automatic task is triggered to the AP new referral queue.

73. Once the task for a new assessment is created there is a 30 working day deadline for the AP to clear it.

AP action complete AP report returned

74. From October 2013 the PIP Assessment Tool (PIPAT) a computer system for APs to support the assessment process is available to APs within limited areas. . PIPCS and PIPAT are linked therefore assessments and reports can be completed and returned through PIPAT into PIPCS. However, APs can choose a phased approach to PIPAT and may continue to access PIPCS directly in some cases. DWP will receive information from the AP either using PIPAT or directly through PIPCS.

75. When all AP action is complete and the AP is accessing PIPCS directly, the assessment is submitted into PIPCS and the completed report form is sent to Mail Opening Unit (MOU) for scanning into DRS.

76. If PIPAT is used by the AP once the assessment questionnaire is submitted in PIPCS through PIPAT the report is uploaded automatically into DRS and the case tasked to the CM work queue.

77. The status of the Application case and of the Determination remains 'In Progress' until the CM completes their action in PIPCS. The questionnaire completed with the HP's answers will be the latest 'active submission' available for the CM to view.

AP returns supplementary reports or other relevant information to the CM

78. The AP can return supplementary reports or other relevant information to the CM by using 'Update Assessment Progress'. The AP can also return a Award Review referral to the CM if they are unable to complete the Award Review submission.

CM reviews all evidence and completes their determination

79. You should review all the evidence from the AP. If you are satisfied with the submission record the effective date of the decision and complete the determination. Select 'complete determination' from the action drop down menu of the particular determination. PIPCS will then display a Complete Determination pop up window. You should:

Step Action

1. select 'Next'
2. PIPCS will then display an Effective Date field
3. enter the appropriate Effective date
select 'Save'

80. PIPCS will then update the Effective Date for the determination and changes the determination status of 'Report Outstanding'. PIPCS will return you to the List determinations page. You should then complete your determination in PIPCS.

81. Where you have made a decision to change entitlement (either extended at the same rate, increased, reduced or disallowed) PIPCS will automatically set the status for Award Reviews Conclusion status to 'Changed'

Modifying the determination

- select 'Determinations' tab; PIPCS will then show completed Determination line
- select 'Action' button on right hand side
- select 'Modify Determination'

The 'Modify Determination' screen will appear.

- select the 'Determination' reason 'Reconsideration'
- requested for 'Claimant'
- select 'Save'.

The 'Determination' status will then revert to 'In Progress'.

The CM will then:

- toggle the 'Determination' line
- add details of new evidence provided, if applicable
- add details of any new disabilities identified, if applicable
- re-answer the questionnaire; making any changes to descriptors as appropriate
- toggle 'Reasons'
- select 'New' on left hand side and cut and paste new reasons

82. You will modify the determination when you want to make changes to the descriptors but this also happens when you request advice from the AP. When modifying the determination you will see the information recorded by the previous Case Manager.

83. Completing this action will create a new determination period which will constitute the body of your decision. You can record new reasons for each component.

84. When you 'complete' the new determination you will be prompted to provide an effective date.

85. If there is a Motability agreement present, you must create a manual task for the Motability team to notify MOps.

86. Where you have made a decision not to change either the duration or level of entitlement, PIPCS will set the status for Award Reviews Conclusion status to 'Unchanged'.

87. PIPCS will notify the claimant or PAB of the outcome decision once you have completed your determination.

CM reviews all evidence and requires further information from the AP

88. If you require further information from the AP you can request further information.

CM reviews all evidence and refers the case back to the AP as rework

89. If you are not happy with the evidence from the AP you should discuss the case with your Quality Assurance Manager (QAM) who will liaise with the AP and refer back See: decision making part 1

CM makes relevant notes on the assessment regarding Award Reviews

90. You can make relevant notes on the assessment regarding the Award Reviews.

You can:

create Assessment Notes;
list Assessment Notes; and
view Assessment Notes.