

# Extract from Work Coach guidance (Jobcentres)

## Call to Action

### Summary

Work Coaches (WCs) should have explained to all claimants in All Work Related Requirements (AWRR) conditionality regime between full service go-live and the date transfers will begin that the claimant and partner, if they have one, will soon be asked to switch to the new online service.

Jobcentres are responsible for Calling to Action:

- single claimants who are in the AWRR conditionality regime
- joint claimants where at least one member of the couple is in the AWRR conditionality regime. (Where the partner of the claimant is not seen in the Jobcentre, the claimants can only be called to action after the UC491 (orientation letter) has been issued to the partner)

### Content

Single claimants are issued with a UC492. Joint claimants are both issued with a UC500 on the same day.

To prepare the UC492 / UC500's, the WC should:

1. Access the database.
2. Update the 'Date Call To Action Issued' field within the 'Transfer Activity' tab of the database with today's date (this automatically populates the 14 day BF date on the 'Non-Compliance' tab on the database).
3. Select the 'Generate Letter' button and completes all relevant fields.

At the planned appointment, WCs should:

1. Explain to the claimant the need to transfer their claim to the FS and highlight the advantages which include:
  - having access to a new online account,
  - being able to view their claim,
  - being able to check their payments or report changes in their circumstances at any time.

2. Tell the claimant that in order to switch their claim to the FS, to make sure they have:
  - their own email address
  - a bank or building society account in your name (or your partners name if you have a joint claim)
  - access to a computer, smartphone or tablet
3. Tell the claimant that when they create their new online account they must select:
  - 'Yes' to the question "Are you already getting Universal Credit?" and
  - 'Yes' to the question "Have you received a letter asking you to switch to this new service?" (see below)

**ALPHA** This is a new service – your feedback will help us to improve it.

## Universal Credit check

**Are you already getting Universal Credit?**

Yes  No

**Have you received a letter asking you to switch to this new service?**

Yes  No

Next

For claimants with a partner, WCs should take the following additional step:

Explain to the claimant they must claim as a couple. Only one member of the couple must start the online application and include their partner's details. A linking code will be sent to the claimants email address. Their partner must then complete the rest of the application using this partner code within 7 days of the claimant receiving it.

4. Inform the claimant that they will be checking that they have undertaken the tasks specified above at the claimant's next appointment with the WC.
5. Consider booking the claimants next appointment a week earlier to encourage the claimant to make their online claim **within the 14 day time limit** to transfer their claim to FS.
6. **Inform the claimant that if they don't switch by the 14<sup>th</sup> day from today, their Universal Credit may be suspended and their claim may be closed.**
7. By questioning the claimant or checking relevant systems, identify if the claimant has complex needs and arrange any additional support if required, this includes:
  - arranging JC assistance
  - arranging UCDS Assist or
  - confirming that the claimant will complete at home independently
8. Note Work Services Platform (WSP) in all cases with the actions agreed.
9. Hand the letter to the claimant and, in the case of a joint claim post (if not seeing the partner on the same day) the letter to the partner.
10. Open and completes a UC7 Live Service Knowledge Management, noting "No task required".
11. Attach a copy of the letter(s) to the UC7, and send by courier to the Mail Opening Unit (MOU) to upload to Document Repository System (DRS).
12. The following note must be copied and pasted into CAMLite contact history:  
"Transfer case from live to full service - call to action letter issued".

# Extract from end-to-end guidance (Service Centres)

## Call to Action

### Summary

How to 'Call to Action' suitable claimants

### Content

Single claimants are issued with a UC492 or, where the claimant has a partner, both claimants are issued with a UC500.

Where the claimant is suitable for a UC492 / UC500, this is issued:

- on the first day of their assessment period, as soon as the 'Considerations before being able to be called to action' are complete when the claimant is NWRR, WFI or Work Prep or both members of a joint claim are NWRR, WFI or Work Prep
- after a suspension has been lifted and entitlement to Universal Credit has been re-established
- after a temporary absence has ended
- the day following the issue of orientation letter
- after a 'Change of Circumstances' policy exception has been identified and the claimant has not yet been called to action and there is sufficient time in the current AP

To issue the UC492 / UC500, the CM:

4. Update the 'Pre transfer activity' tab of the database by selecting 'Service centre postal' from the dropdown in the 'Transfer Type' field
5. Updates the 'Date Call To Action Issued' field within the 'Transfer Activity' tab of the database with today's date. This automatically populates **the 14-day BF date** on the 'Non-Compliance' tab on the database.
6. Selects the 'Generate Letter' button and completes all relevant fields ...
7. Posts the letter to the claimant(s).
8. Uploads the letter(s) to the Document Repository System (DRS)
9. Copies and pastes the following note into CAMLite contact history: "Transfer case from live to full service – call to action letter issued".

# Considering suspension of the Live Service claim at 14 day BF

## Summary

Action to take to suspend the Live Service, where claimants have not completed all the actions required of them.

## Content

The claimant and/or their partner having failed to complete any of the following, could now have their LS claim suspended:

- create a FS online account, and declare their FS claim.
- book and attend an appointment and to verify their identity
- provide all the evidence to support their identity

If the LS claim has been suspended for any other reason other than the transfers' process, do not send the UC495 / UC503 until the current suspension is resolved. Instead CMs should set a BF in the 'CM Notes and BF' tab of the transfers' database for the end of the suspension.

When the BF matures, if the claim is terminated, note the 'Pre-transfer' tab of the transfer database with today's date in the 'Terminated not nil due to earnings' field.

If the suspension has been lifted, then consider if the suspension due to non-compliance is appropriate.

Where the claimant has booked an IEI but this is after the point at which suspension action would normally be taken, no suspension action should be taken at this time.

For each claimant requiring their claim to be suspended, the CM:

1. Updates the 'Non-Compliance' tab of the transfer database with the 'Date Suspension Letter Issued and Account Suspended' field with today's date. This auto populates the 32 day BF field.
2. Selects the 'Generate Letter' button and completes all relevant fields.
3. Posts the letter to the claimant(s). For data security reasons, it is not appropriate to issue this letter by email.
4. Uploads the letter(s) to the Document Repository System (DRS)
5. Updates CAMLite contact history by copying and pasting the following note "Transfer case from live to full service – No further payments to be made on Live Service, claim suspended as claimant failed to comply with transfer process"
6. Suspends the claimants Universal Credit LS claim using suspension reason 'Transfer – Non-compliance' and suppresses notifications.