

# Spotlight on: claims by phone

## Introduction

The facility for claimants to make new claims by phone is available for those who are unable to complete the online service due to all the following circumstances:

being unable to make a claim online independently

not having anyone to support them to make a claim online

being unable to claim online with in-house jobcentre support. See Assisted Digital Overview

being unable to obtain help through the Citizens Advice and Citizens Advice Scotland Help to Claim service

The claim by phone process should only be used when **all** other assisted digital options have been exhausted and all reasonable attempts have been made to enable, support and educate claimants to self-serve online. See Assisted Digital Overview

The call may be from an appointee wanting to make a claim on behalf of the claimant.

If the claimant has a personal appointee then the criteria above should be considered.

If the claimant has a corporate appointee the new claim should always be taken by phone as a personal email cannot be provided.

**If a claimant does not satisfy the above circumstances but insists on making a claim by phone, they should be allowed to do so.**

Claimants should be advised to contact the Universal Credit Service Centre number and an appointment will be booked for the claim to be taken over the phone.

## National Telephony

When a claimant asks to make their claim by phone the process is started via the 'Telephony ID Check' option in the toolbar of the agent dashboard.

Check:

the claimant's eligibility by inputting the postcode to confirm the claimant lives in a UCFS area

how many children live with the claimant

Advise the claimant that when they claim Universal Credit all existing Legacy benefit claims will be closed and can not be reopened.

Explain to the claimant why it's best to claim online – they can access their claim whenever they want, ask questions, send us messages or see when they will be paid. By making a claim by phone, they will be unable to do any of this and they will always have to make contact with us by phone.

There is also a risk that payments may be delayed if we have difficulty contacting them to tell them about things they need to do.

Ask questions to understand a claimant's circumstances and why the claimant is not able to make a claim online, ask if there is anyone who could help them make the claim, if they have an email address or if they have internet access at home.

**The claimant will not access their claim online as they have no username or password.**

## Maintaining the claim

Claimants should be supported to move their claim online wherever possible. This support should be offered by either the work coach or case manager.

The reason for the claim being made by phone will be shown in the claimant history to assist with tailoring claimant support appropriately.

The claimant will not have online access to their claim. Any notifications or notes must still be placed in the journal as normal but in addition the agent will have to consider what other methods of contact to use. This also applies to claimant to-dos.

The statement must be posted to the claimant because it sets out their legal rights. To prompt this action a 'Print and post statement' to-do will be generated when the statement is produced. This will be located in the 'payments due' section of the agent dashboard.

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### **Changing from phone to online claim**

Phone claims should be regularly reviewed with the claimant by both work coaches and case managers. They should ensure this is still the most appropriate channel for them to manage their claim.

If a claimant attains the skills and support to manage a claim online take the following action:

access the 'Change from phone claim to online' ALP which is held in the resources area of Universal Learning. Complete the first two sections of this ALP

generate a 'Change from phone claim to online' to-do. This is only available to cases flagged as phone claims and only when the claimant's identity has been verified

this sends a link to the claimant's email address for them to set a password. The service sets a user name

The claimant will then be able to manage their claim online, and see any journal entries previously made.

This process should be completed face to face and only exceptionally over the phone.

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