



WS017 Initial Work Search Interview

**Facilitator Led Brief
V7.7**

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Topic	Topic title	Duration
Intro	Module Aims and Objectives	2 minutes
1	Claimant Commitment and Conditionality Overview	10 minutes
2	Purpose and Pre-Interview Preparation	12 minutes
3	Information Gather and Diagnosis	26 minutes
4	Setting Work Related Requirements and Interventions Regime	15 minutes
5	Using Universal Jobmatch for Work Search	30 minutes
Total duration of all topics		105 minutes

Important Information:



Please note that not all job roles are required to complete every topic within this module.

The next page has full details of which topics are required by each Job Role.

The Universal Credit Learning Journey has a full list of all the learning modules required for each Job Role and the order in which they should be delivered/completed.

This can be viewed on the LDO Support Site.

Job Role	Learning Required	Duration
Work Coach Work Services Manager System and Process Support	All Topics	105 minutes
Demand Management Officer Telephony Agent Telephony Team Leader	Topic 1	10 minutes



Show Slide 01 – WS017 Initial Work Search Interview



Before delivery of this module you should familiarise yourself with the contents of the Facilitators Preparation Pack.

Module Aims and Objectives



Show Slide 2 – Module Aims and Objectives

Aims

This module aims to provide you with the skills and knowledge to conduct an Initial Work Search interview (WSI), record information on the Work Services Platform (WSP) and produce a Claimant Commitment and Commitment Pack.

Objectives

By the end of this module, with the aid of any reference material, you will be able to correctly:

- introduce the Claimant Commitment purpose and use
- explain how the Claimant Commitment affects eligibility to Universal Credit

- explain the need for committing to the steps on the Claimant Commitment
- explain the sanctions that may be applied if the claimant fails to complete the steps
- confirm the claimant's identity has been verified
- gather and record the information required from the claimant on WSP
- determine the claimant's job goals and skills
- diagnose the claimant's capability and circumstance
- set work search activities, work preparation actions, and other work related activities



Show Slide 3 – Aims and Objectives (Cont)

- set the Intervention Regime
- preview and print the Claimant Commitment
- establish whether the claimant accepts the Claimant Commitment or not.



Learners should be reminded that NINOs used within training materials are for training purposes only and that anyone entering them into a live system will be in breach of security policy.

Topic 1

Claimant Commitment and Conditionality Overview



Show Slide 4 – Topic 01 Claimant Commitment and Conditionality Overview



Show Slide 5 – Topic Aims and Objectives

Aims

This topic aims to provide you with an overview of Universal Credit and the conditionality groups who will be eligible to claim Universal Credit.

Objectives

By the end of this topic, with the aid of any reference material, you will be able to correctly:

- list the four main conditionality groups
- state for whom a light touch in work conditionality regime will be introduced from Day 1



Show Slide 06 – Overview

Universal Credit is designed to ensure that, for people who can, work is still the best route out of poverty and an escape from benefit dependence. The aim of Universal Credit is to support claimants to find work, more work and to increase their earnings.

The conditionality regime refocuses the relationship between the claimant and the Department. The relationship must be centred on a “contractual” concept that provides a range of support, in return for claimant’s meeting a clear set of responsibilities.

The sanctions regime underpins the relationship and encourages compliance. A key element of the relationship is about helping the claimant to take responsibility for preparing for work, finding work and taking up more and better paid work.

The Claimant Commitment is at the heart of this personalised approach. Compliance with requirements, such as active work search and engagement with the Department, increases the chances that claimants find work more quickly than they would otherwise. The Universal Credit approach will ensure that there is clarity about claimant requirements and consequences.

The Claimant Commitment will address this, setting out all requirements and consequences in one place, ensuring claimants understand what is required.

The key role it will play is reflected in the fact that all claimants are required to accept a Claimant Commitment as a condition of entitlement to Universal Credit



Ensure the learners are clear that the Claimant Commitment should not be referred to as a contract with terms and conditions. The Claimant Commitment is a document that details the actions a claimant is required to take to secure employment in return for financial support and assistance



Refer the learners to Handout 01.01 “Summary of Conditionality Groups”

All claimants will fall into one of four main conditionality groups, and the policy aims for each group will differ. This will be reflected in the type of Claimant Commitment they have. The groups are:

All-Work Related Requirements group

- This group comprises all claimants that do not fall within the groups below. These claimants will be required to attend a face to face interview as soon as possible following an initial claim. The objective of this interview is for the Work Coach to discuss, tailor and produce a Claimant Commitment with the claimant. Once the claimant has accepted their tailored Claimant Commitment, compliance with the requirements within it is managed and regularly monitored.

Work Focused Interviews Only group

- Claimants in this group include those responsible for children aged over 1 and undern 3 and foster carers. They will be required to attend regular work focused interviews which help them focus on how they can move into work in the future and the steps they can take to prepare for this.

Work Preparation group

- The claimants in this group will have had their conditionality determined following their Work Capability Assessment as having Limited Capability for Work and are set requirements

which help keep them motivated by preparing them to return to work as soon as they are able, taking into account their capability and circumstances. It will also include those people responsible for children aged over 3 and under 5.

No Work-Related Requirements group

- Claimants in this group are either not expected to work or have earnings above their conditionality earnings threshold. They will be required to notify the Department promptly of any changes.



The term Conditionality Group is used for Universal Credit, however when talking to a claimant this term shouldn't be used. You should explain to the claimant that this is the requirement they need to meet to qualify for Universal Credit.



Show Slide 07 – Conditionality Groups

Currently, only claimants who fall into the All Work Related Requirements group will be eligible to claim Universal Credit.

However, if a change in circumstances results in a change in conditionality group, they will remain on Universal Credit and their conditionality will be managed accordingly.

How you deal with these circumstances will be covered in later modules.



Show Slide 08 – Earnings Over Lower Administration Threshold but Under Upper Earnings Conditionality Threshold

Ministers are keen that a light touch, in-work conditionality regime is introduced from day one, to encourage claimants to increase their weekly earnings and reduce their dependency on welfare. This will apply to claimants with earnings over the lower administration threshold, but under the upper earnings conditionality threshold from Day 1. It may not involve face to face interventions.

It may include:

- each claimant in this group having a Claimant Commitment, which sets out clear expectations to increase their earnings and is tailored, as far as possible, to their specific circumstances.
- the requirement for claimants to maintain a record of the steps they have taken to try and increase their earnings.
- maximising our IT services (particularly Work Services Platform (WSP) and Universal Jobmatch) to automate, as far as possible, the monitoring of a claimant's activity against their set expectations.



The administrative threshold is £330 for single people and £525 for couples per month.

The upper earnings threshold is the number of hours they are expected to be available for employment (using a maximum of 35 hours for this calculation) x the National Minimum Wage.

For claimants in the Work Focused Interviews Only or Work Preparation Conditionality Groups it is 16 hours x the National Minimum Wage.

The amounts given here are correct as at 31 May 2013.

Topic Summary



Show Slide 09 – Topic Summary

In this topic you have learned:

- what the four main conditionality groups are
- for whom a light touch in work conditionality regime will be introduced from Day 1

Topic 2

Purpose and Pre-Interview Preparation



Show Slide 10 – Topic 2

Purpose and Pre-Interview Preparation



Show Slide 11 – Topic Aims and Objectives

Aims

This topic aims to explain the role and responsibilities of the Work Coach when preparing for and conducting the Initial Work Search Interview.

Objectives

By the end of this topic, with the aid of any reference material, you will be able to correctly:

- state the purpose of the Initial Work Search Interview
- describe the different roles the Work Coach is expected to perform during the Work Search Interview

- list the five core elements that form the basis of the Work Search Interview
- state the importance of pre-interview preparation



Show Slide 12 – Purpose of the Initial WSI – All Work Related

The purpose of the Initial Work Search Interview (WSI) is to:

- set requirements that, if complied with, give the claimant the best possible prospects of finding paid work, taking into account their particular capability and circumstances. Requirements must be set in line with legislation, guidance and agreed national / local journeys
- ensure the claimant understands the requirements they must meet and the consequences (sanctions) of any failure to comply
- ensure the claimant is committed to complying with their requirements and motivated to find work



Slide 12 outlines the purpose of the Initial Work Search Interview. The following slides give further detail of the role of the Work Coach in the Initial Work Search Interview.

The Role of a Work Coach in the Initial WSI

Before the WSI the Work Coach will:

- confirm the claimant's identity has been verified
- gather information about the claimant and prepare for the interview



Show Slide 13 – The Role of a Work Coach in the Initial WSI

During the Initial WSI the Work Coach will:

- Introduce themselves and gather information.
- Explain the purpose of the interview
- Check the claimant is in the correct Conditionality Group
- deliver the five key elements of the interview

- diagnose the claimant's Capability and Circumstances
- set Work Search Activities
- ensure the claimant takes responsibility for their own work search and preparation activities
- ensure the claimant understands what is required of them.



The five key elements of the Initial Work Search Interview are listed here. These will be looked at in more detail later in this learning.



Show Slide 14 – The Role of a Work Coach in the Initial WSI (cont)

- put in place a strong compliance regime that is appropriate for each individual claimant
- determine the appropriate Interventions for the claimant which includes subsequent interviews and Work Search Reviews
- create an *individually* tailored Claimant Commitment
- ensure the claimant accepts the Claimant Commitment

- take the necessary action when a claimant does not accept their Claimant Commitment
- set Interventions Regime
- set Work Preparation Actions
- ensure the claimant is aware of the consequences of not complying with their Claimant Commitment

The outputs from the Initial Work Search Interview are:

- the Claimant Commitment
- the Commitment Pack



Learning for the Commitment Pack is covered in Topic 6 of this module.

Remind the learners that some claimants will fail to attend their Initial Work Search Interview. The action to take when a claimant fails to attend their Initial Work Search Interview is covered in UC 087 – Universal Credit FTA Action – Work Coach



Show Slide 15 – Structure of the Work Search Interview

Five core elements will form the basis of the Work Search Interview and this in turn will feed into requirements set out

in the Claimant Commitment and Commitment Pack.

- Diagnosis of claimants capability and circumstances
- Introduction and Information Gather
- Setting Interventions Regime
- Setting Work Preparation Actions
- Setting Work Search Activities



We will now look at the Pre-Interview Preparation and the Introduction and Information Gather for the Initial Work Search Interview. The other elements are covered in later topics of this learning



Show Slide 16 – Pre-interview Preparation

Pre-interview preparation is important to ensure the quality of the interview and the Claimant Commitment.

In order to prepare for the interview it is important to review any information that is held about the claimant on WSP, this includes sanction history, previous work programme referrals, and to ensure claimant special arrangements for attending interviews have been taken into account/arranged.

Pre-interview preparation equips you with an understanding

of some of the claimant's circumstances so that you can begin to plan the structure of the interview and formulate any questions that you would need to ask the claimant to gather more information.



Any Sanctionable failures which occurred on or after 22 October 2012 may impact on the current Universal Credit Claim.

Discuss with the learners the information they can gather prior to the Initial Work Search Interview which will help them ensure a quality interview and quality Claimant Commitment. Suggested answers are on the following slide. This list is not exhaustive.

Note: How to call up an appointment list in WSP and check claimant special arrangements for attending an interview are explained in WS008 – Work Search Review



What key points will pre-interview preparation help you to consider, when planning your approach for the Work Search Interview i.e. regarding your claimant's circumstances?



Thorough pre-interview preparation will help to consider the key points and approach for the interview by:

- identifying and addressing any outstanding issues from previous claims

- noting any JSA sanctions imposed for failures occurring on or after 22 October 2012. NB. This will need to include ESA sanctions imposed for failures on or after 03 December 2012 for those with limited capability for work (LCW).
- identifying if the claimant needs to be referred early or re-referred to any mandatory provision they were participating in, this includes the Work Programme
- identifying any challenges to employment
- obtaining relevant background information
- establishing what issues need to be dealt with. NB. this will include considering the reason for leaving previous employment in the last 6 months and taking follow up action to enable a referral to the Decision Maker, if appropriate
- preparing some initial ideas about possible help and advice
- considering the key points for the interview



Learning for Universal Jobmatch is covered later in this module.

For claimants in the All Work Related Requirements group existing guidance applies when looking at the reason for leaving last employment.

During the data gather employment history information will already have been recorded on WSP, however more information may need to be collected at this stage to answer this question. This information can be found in the 'Employment History' section in the 'Information' menu of the claimants WSP record.

If the reasons for leaving work are LV or Misconduct then further information will be gathered from the claimant on UC84 - Loss of paid work or UC84A - Loss of pay and referred to a DM if appropriate.

Where a claimant has previously been referred to the Work Programme and is making a new Universal Credit benefit claim within the 2-year period of initial referral to WP (this referral might have been made on LMS). Check for historical WP information e.g. referral history in the WSP 'Notes' field to prevent inappropriate (second referrals) to the Work Programme.

Re-referral will not be made on the WSP system, a WP07b to notify a change of circumstances must be sent to the Provider to notify that a WP participant has made a new claim to Universal Credit see WS008 – Work Search Review

All basic claimant information should have been input before the date of the interview. The claimant record should be ready for you to carry out your interview preparation.



Show Slide 17 – How to Start and Complete the Interview on WSP

Before you start the Initial WSI, in the claimant record on WSP:

- select **Appointment History** from the Navigation menu on the left hand side. This will show a list box in the claimant record.
- select hyperlink "to load appointment records click here" within the list box, this will bring up a list of all booked appointments for the claimant
- open the appointment (double select/click)
- From the Ribbon select - **Start Appointment**.
The status of the appointment will be updated to Started and the Actual Start date and time will be populated automatically. The appointment record must be left open whilst all other actions are completed in WSP

To close the appointment record on WSP

- Select **Complete Appointment** button on the Ribbon. The status of the appointment is set to completed and the **Actual End** date and time will be populated automatically. The **Actual Duration** will also be calculated by WSP and displayed in minutes
- Select **Save and Close** button on the Ribbon

Topic Summary



Show Slide 18 – Topic Summary

In this topic you have learned:

- the purpose of the Initial Work Search Interview
- the different roles the Work Coach is expected to perform during the Work Search Interview
- the five core elements that form the basis of the Work Search Interview
- The importance of pre-interview preparation

Topic 3

Information Gather & Diagnosis



Show Slide 19 – Topic 3
Information Gather & Diagnosis



Show Slide 20 – Topic Aims and Objectives

Aims

This topic aims to provide you with the skills and knowledge to carry out an Initial Work Search Interview

Objectives

By the end of this topic, with the aid of any reference material, you will be able to correctly:

- state how to confirm on WSP the claimant's identity has been verified
- explain the purpose of the Initial Work Search Interview to the claimant
- state what you need to consider when exploring claimant capability and circumstances
- state the action to take to identify an English Language requirement

- state what considerations need to be taken into account when determining the claimant's job goals
- state what considerations need to be taken into account to diagnose the claimant's availability and current skills
- state what considerations need to be taken into account to identify skills gaps
- explain how to escalate claimant queries



Show Slide 21 – Introduction and Purpose of the Initial WSI for the Claimant

After introducing yourself at the start of the interview, you will need to explain the purpose of Universal Credit and the Initial Work Search interview to the claimant. This will include:

- confirming the claimant's identification is verified
- being clear what your role as a Work Coach is - to support and prepare the claimant for Work Search and Work Preparation, and not do it for them
- discussing the claimant's circumstances and

capability to ensure they are in the correct conditionality group

- explaining that the information gathered will be recorded on their claimant record and used to inform the steps outlined in their Claimant Commitment
- explaining that in order to be entitled to Universal Credit the claimant is required to accept their Claimant Commitment (taking into account all the information gathered)

Explaining the impact that may apply to the amount of Universal Credit paid where sanctions were applied during a previous claim (if applicable) and that financial sanctions and/or further sanctions may apply if they fail, without good reason, to comply with any requirements.



For Universal Credit the Initial Work Search Interview is carried out by a Work Coach. Prior to this interview the claimant will have a Non-Repudiation Interview with the Personal and Account Support Agent (PASA). Remind the learners that the claimant's identification needs to be verified by the PASA before the interview takes place.

Advise the learners that work related requirements sanctions will apply if a claimants fails, without good reason to meet a requirement notified to them.

A sanction is a reduction to Universal Credit payments. The amount their Universal Credit will be cut by per day must be set out and explained on the Claimant Commitment.

The Claimant Commitment Pack includes more information on the length of sanctions.

Confirming Claimant Identification is Verified on WSP

In the majority of claims the Personal and Account Support Agent (PASA) will show the claimant to you after the non repudiation interview and confirm that ID has been verified. If the PASA does not show the claimant to you, you should ask the claimant to provide verification of their identity as per current guidance.

You will be required to record on the claimant WSP record that identification (ID) has been verified.

Before the ID verification flag can be set on WSP there must be:

- a Claim Date recorded

- a Claimant Commitment dated on or after the claim date
- the latest Claimant Commitment needs to be recorded as 'accepted' by the claimant

This means that you will be unable to carry out this task until the end of the interview, or later if ID is not verified or the claimant does not accept the Claimant Commitment.



DWP Common Standards for ID verification apply.

Attempting to record that ID has been verified before meeting the required WSP conditions will produce an error message when attempting to 'Save' the claimant WSP record.

Depending on local arrangements the actual update to the WSP claimant record may be done either by the Work Coach or when the WSI bundles are collated at the end of each day.



If the Work Coach does not up update the WSP claimant record, local practice will determine which job role undertakes this task when the WSI bundles are collated.



Show Slide 22 – Confirming Claimant Identification is Verified on WSP

To record on WSP that ID has been verified you will take the following action:

- select the claimant's **ID Verified** drop down field within the General screen. This will be defaulted to **No** until updated
- select **Yes** from the drop down menu
- select **Save** from the Ribbon menu

If the claimant does not:

- provide sufficient verification of their identity; and/or
- does not accept the Claimant Commitment and enters a period of 7 calendar days as a 'cooling off' period, or requests a second opinion

You will need to carry out follow up activity to track progress and ensure this field is updated as soon as all the required action has been met and recorded.



Learning about the 7 calendar day ‘cooling off’ period, second opinion interviews, and recording claimant acceptance of the Claimant Commitment is covered later in this module.

If the ID Verified field is not completed a task will automatically be generated to inform the Work Coach that this must be followed up.

The ID Verified field must be completed within 4 weeks of the claim start date.

If this is not included CIS will not pull correct claimant information over to WSP and payment of Universal Credit cannot be made.



Show Slide 23 – Information Gather During Diagnosis

During this part of the interview you will be gathering information for input to WSP by diagnosing claimant capabilities, personal circumstances and life events at this time.

You will also need to establish if the claimant has any English language requirements and take any relevant action.

The English Language Screening Aide – UC27 will provide you with information to enable you to determine what level of spoken English the claimant has and whether they would benefit from a referral to a Provider for English Language training.



Issue Handout 03.01 – English Language Screening Aide

Allow the learners 5 minutes to look through the handout.

If you have already established that the claimant has English Language Requirements and that the claimant is below E2, you will not need to screen the claimant for English speaking and can refer them directly to Skill Conditionality for English Language Training.

For example if the claimant has brought an interpreter it is reasonable to assume they are below E2. Information can also be gained from the Special Needs indicator in WSP.

If after screening the claimant you identify that the claimant is below E2 you will need to:

- explain the importance of English language skills for finding work
- identify and discuss available opportunities, using the District Provision Tool for local provision

- advise the claimant that it is mandatory to take steps to address their need
- incorporate agreed steps into the Claimant Commitment

You will need to refer the claimant to English Language training using Skills Conditionality. This is a mandatory requirement and should be recorded in Work Preparation on the Claimant Commitment so that the claimant is aware of the consequences and sanctions.

If required use the Bigword telephone interpreting service to explain the mandatory requirements of attending and participating in English Language training and the consequences of not doing so.

The training will generally last between 7 and 20 weeks (for between 8 and 16 hours a weeks). While training, claimants will still be expected to attend the jobcentre and undertake agreed activities.

Claimants who fail their final assessment and who are not likely to move quickly into work may be re-mandated to continue their course, if this is appropriate in their circumstances.



Although the Work Coach will use the English Language Screening Aide and questioning skills to gauge the claimant's English, the actual level will be determined by a Provider following a formal assessment.

Only when the Provider assessment has been completed and the claimant's English language skills have been confirmed as below level E2 can the claimant be referred for training.

If the claimant is not below E2 for English speaking:

- select 'notes' from the information tab in WSP
- select 'Add a new note' hyperlink from the notes section
- record the outcome of the English Language screening



The note should include the date the screening was conducted and 'Claimant suspected as at or above level E2 for English speaking and listening skills screening.'

It is important to remember during the discussion and throughout the interview your focus should be on the 'positives' – including what the claimant can do rather than cannot do.

Capability

- Accurate in depth information needs to be gathered in relation to the claimants personal circumstances/life events, including any underlying personal circumstances, such as:
 - Health issues/disability
 - Caring Responsibilities
 - Drug or alcohol dependency

These details will be used to determine the Claimant's hours of availability to take up work, their availability to attend an interview and also to determine the required hours of work search.

Skills/Abilities

- *you will need to explore and evaluate the claimant's work history, job goals and skills/abilities in order to determine any support required and to be able to set tailored work related requirements which will be recorded on the Claimant Commitment.*



If a change in circumstances is reported at the Initial Work Search Interview the claimant will be referred back to Contract Services to report the change.

Referral to the Disability Employment Adviser (DEA) remains the same. One of the steps on the Claimant Commitment may be to attend an appointment with the DEA. This step must be put in the 'Other Work Related Activity' box as it cannot be a requirement that the claimant attends an appointment with the DEA.

Recording an English Language requirement is covered in covered in the 'Create Claimant Commitment' simulation. The simulation will also cover recording Qualifications on WSP.

How to enter the information on WSP is covered in WSP Action Capturing Information in this module, in the topic on the Claimant Commitment.

Work Programme Returner

You will also need to consider whether the claimant is a Work Programme returner. A Work Programme returner is a claimant that has been referred to the Work Programme but has not yet completed the 104 weeks on the Work

Programme.

This information will be displayed in WSP notes as part of pre population.

These claimants must be sent back to the Work Programme provider using WP07B to indicate that the claimant has made a new claim to Universal Credit as this is a change of circumstances for the Work Programme provider. However this must not be done through WSP as it will create another referral and therefore another payment via PRAP to the Work Programme provider.

If the claimant is a prison leaver this will have been noted when the claimants WSP record was created. It is mandatory for all prison leavers in the AWRR intensive regime who claim Universal Credit within 13 weeks of leaving prison to be referred to the Work Programme immediately.

Further information on eligibility for the Work Programme will be covered later in the learning.

For claimants who is 18 years of age you must consider their NEET status (Not in Employment Education or Training).

The claimant is treated as NEET from the date immediately following the last date an 18 year old claimant took part in employment, education or training.

In terms of NEET, apply the following definitions:

‘Employment’ = any paid work (including part-time, temporary and self-employment); it does not include voluntary work.

‘Education’ = any formal course of education (full or part time)

‘Training’ = any formal employment-related training course (full or part time and including ‘Basic Skills’); it does not include ‘Work Experience’, Support Contract modules, CV writing etc.

For more information see ‘Not in employment, education or training’ in About Universal Credit.

At the Initial Work Search Interview

The Work Coach will:

- **ask the claimant when they last did any employment, education or training to identify the NEET date**
- **calculate the NEET date**
- **Select the ‘Personal’ screen from the information menu in WSP**
- **set the WSP NEET tick box**
- **insert the appropriate NEET date**

- **select 'save'**
- **calculate when the claimant will be eligible for the Work Programme**
- **Set a WSP Task to book a Work Programme Referral Interview**

Note: If the claimant will be 19 years old when the Work Programme referral date matures – see the Work Programme Eligibility Guidance

The WP referral date is calculated so that a task can be set to mature 4 weeks before the WP referral date. When the task matures a WP referral interview can be booked

Task Subject: Book WP referral interview - NEET claimant

Audience: Work Coach

Body: Date the claimant is due to be referred to the WP. Book an interview on or after the WP referral date

Maturity: 1 month prior to the WP referral due date

Example1

if the claimant had been NEET for 2 months before their claim date we would refer them to the work programme 4 months after their claim date.

Example 2

If a claimant had been NEET for 5 months before their claim we would not refer them to the WP until after 3 months of pre-WP activity (the claimant will have been NEET for 8 months but because they have to do 3 months of pre - WP activity they couldn't be referred any earlier).

Diagnosis of Capability and Circumstances

You will need to hold a detailed conversation with the claimant to establish any underlying personal circumstances, and explore and evaluate realistic job goals with them. This will assist you in recording the correct information on WSP before producing a Claimant Commitment that is tailored to the needs and circumstances of the claimant.

It is important that the Claimant Commitment should be robust, and effective in providing the claimant with the best prospects of finding paid work or more paid work.



When the Initial Work Search Interview was booked the Account Developer would have agreed with the

Claimant a set of activities for Day 1 conditionality.

These activities are: set up an email address, create a CV and create a Universal Jobmatch account.

The Work Coach will establish if the claimant has completed any or all of these Day 1 conditionality activities. If the claimant has not completed each of these activities the Work Coach will mandate the claimant to do so by recording this in the Work Prep activities on the claimant commitment.

If the claimant has MAPPA restrictions which prevent access to the internet or the claimant does not have sufficient IT skills to set up a CV the Work Coach will use local provision to overcome these challenges.



Show Slide 24 – Diagnosis of Capability and Circumstances

Claimants with health problems should be considered carefully.

Please note this information should not be shared with employers at the application stage of the recruitment process.

A claimant with a health problem may state that they have a limited capacity to stand and need to sit frequently. The Work Coach would challenge the claimant to advise of what they are able to do, can they sit without problem, can they walk without problem, what other skills they have, how do they spend their day. An example statement for the commitment pack would be - "I am able to undertake multi-positional work (work which does not involve maintaining one position for a prolonged period)."

You will diagnose the extent to which the claimant is motivated and positively committed to complying with actions and expectations and consider appropriate remedial work related activities where required.

It is important to focus on what the claimant can do rather than what the claimant cannot do.



Slide 24 talks about focusing on what the claimant can do rather than what they cannot do.

Discuss with the learners what they understand by this/ other examples they can think of.

Having a driving licence, having a car, living on a specific bus route, these are all positives for a claimant's job search.

Remind the learners about Equality and Diversity (Business As Usual) requirements. Here is an example of when a claimant may have the ability to carry out a specific type of work but not want it including in their job goals: Claimants who follow *Islamic, Jewish and Sikh faiths and/or a vegetarian with strong beliefs in animal rights, can refuse to work in an environment where they would come into contact with products containing animal matter or animal matter from animals not slaughtered under their religious specifications such as a butchers, the deli counter at a supermarket, glue factory, leather works, confectionary factory, fish & chip shop.*



When diagnosing capability and circumstances it is important to consider the extent of the claimants work history.

Where a claimant has a strong work history, in what way may you allow claimants to restrict their jobsearch?



Where a claimant has a strong work history you may allow claimants to restrict their job search to only look for work relating to a particular job, location and/or salary for which they have recent experience.

This would be an acceptable restriction if you agree that the limitations do not unduly affect the claimant's chances of getting back into work. This will be totally at your discretion.



What term do we use when allowing this restriction and for what maximum period of time do we allow this?



The term used is a “permitted period”.

The maximum time allowed for a permitted period is 3 months but note this is the ‘maximum’ and you have discretion to set a limit within this time, but no more than 3 months

Where there is no limitation on the type of work, salary or location, the claimant will be expected to look for and take up any suitable paid work, paying at least the national minimum wage



Stress that the restriction is not to be used as the old “Permitted Period” was and given as a 3 month restriction almost carte blanc. The Work Coach must assess the realism of the restriction before allowing it in the light of previous work history and local labour market conditions.

Diagnosis of Capability and Circumstances (Cont)

You will come across claimants who will need to limit their availability and work search activity during the life of the claim because of their personal circumstances or life events at that time.



Can you give me an example of when this might be?



- Claimants who become long term sick and are awaiting the outcome of a Work Capability Assessment (personal circumstances)
- Claimants experiencing a domestic emergency

such as death of a friend/relative (life event)

During the lifetime of the claim the claimant may, due to changing personal circumstances/ life events, move into one of the alternative conditionality groups outlined earlier in this learning. This will require production of a new Claimant Commitment tailored to their new circumstances.



Show Slide 25 – Diagnosis of Capability and Circumstances - Availability

When setting a claimant's availability there is an expectation that for the All Work Related Requirements group most claimants will be available to take up a full time job, available to start work immediately, and able to attend an interview immediately.

Hours

A claimant will not be required to take employment which requires them to work for more hours than the European Working Time Directive which is up to 48 hours per week. The definition of full-time should take its natural meaning and applies to hours deemed as 'full time' for a job type. For instance, outside of London, full time in the Civil Service is defined as 37 hours but for a postman it is 40 hours.



If a claimant is legitimately able to restrict their hours to below 35 per week this should be noted on WSP.

If a claimant asks to set limitations on the days they are available to work due to their ‘firmly held beliefs’, this in itself should not stop the claimant looking for full time hours. For example, a claimant whose faith dictates they cannot work on a Saturday or Sunday (their Sabbath) can still have full time availability for work over the remaining 6 days of the week.



Show Slide 26 – Escalate Claimant Queries

If a claimant raises a query that you cannot resolve you will need to escalate the query. The action that you take will depend upon the nature of the query.

If the query is work related you will need to conduct a warm handover to a suitably skilled member of staff or your team leader. A warm handover involves explaining the nature of the query to the member of staff/team leader and then introducing the claimant to the staff member.

You will then need to update WSP 'general notes' with details of the action already taken and the reason why the enquiry could not be answered.

If the query is not work related you will need to inform the claimant that they need to contact the Service Centre and provide the claimant with the contact details for the Service Centre and update WSP 'general notes' with details of the action taken. If the claimant has complex needs and requires additional support you will need to complete a warm handover to a PASA who will either deal with the query or contact the Service Centre on behalf of the claimant.

Topic Summary



Show Slide 27 – Topic Summary

In this topic you have learned:

- how to confirm on WSP the claimant's identity has been verified
- how to explain the purpose of the Initial Work Search Interview to the claimant
- what you need to consider when exploring the claimant capability and circumstances
- what considerations need to be taken into account to diagnose the claimant's job goals
- what considerations need to be taken into account to diagnose the claimant's availability and current skills
- what considerations need to be taken into account to identify skills gaps
- the action to take to escalate claimant queries

Topic 4 - Setting Work Related Requirements and Interventions Regime



Show Slide 28 – Setting Work Related Requirements and Interventions Regime



Show Slide 29 – Topic Aims and Objectives

Aims

This topic aims to provide you with the skills and knowledge to tailor work related requirements and intervention regimes for claimants, based on their individual circumstances and abilities.

Objectives

By the end of this topic, with the aid of any reference material, you will be able to state:

- what considerations need to be taken into account when setting work related requirements
- what considerations need to be taken into account when determining the Intervention Regime

Work Related Requirements

When setting work related requirements it is essential that all work search, work preparation and work search interview requirements are tailored to the claimant's current personal circumstances and abilities.

The expectation for a claimant in the All Work Related Requirements group is that they will take all reasonable actions to prepare for and find paid work. To help them do this you will need to focus on quality work preparation and work search, *not quantity*. This will give the claimant the best prospect of finding paid work.



Show Slide 30 – Work Related Requirements

Claimants should fully understand the expectation that in order to receive Universal Credit they must undertake activities that give them the best prospects of moving into work.

When setting the requirements, unless information gathered in relation to the claimant's personal circumstances/health allows a reduction, it is expected that claimants will take all reasonable actions to find work, **normally for 35 hours per week**. If limitations have been applied to the claimant's available hours, they will also be applied to their work search activity.



Setting work related requirements is about investing time to get results. This may involve sending a claimant on an IT course over a number of weeks to increase their skills and in turn increase their prospects of finding paid work. Discussing and making referrals to work preparation opportunities is covered in more detail later in this module.

Setting the Work Related Requirements

By the end of this process, the intention is that the claimant is committed to complying with their work related requirements and motivated to find work. In setting work related requirements, it is necessary to work with the claimant to produce a detailed plan of action, articulating the steps they must take to give themselves the best prospects of finding a job.



Show Slide 31 – Setting the Work Related Requirements 1/3

It should be made clear to the claimant that they will normally be expected to devote 35 hours a week to preparing and searching for work, unless the claimant's personal circumstances/health allows a reduction. A plan of action will include:

- any mandatory work preparation requirements – such as attendance at training or CV clinics – that will benefit the claimant
- other (non-mandatory) activity the claimant is engaged in that you have agreed improves their employment prospects. For example, if they are undertaking paid work or voluntary work (though this can only account for up to 50% of the expected hours – this is explained in more detail later)
- any work search activity which will take up the majority of a claimant's time

When discussing a work preparation and search plan, your role is to focus on quality not quantity



Use of Universal Jobmatch and Making Referrals on WSP are covered in separate topics.



Show Slide 32 – Setting the Work Related Requirements 2/3

It is not set out in guidance how long any particular activity should take as this will vary from claimant to claimant according to their circumstances and abilities.

Where a claimant has done all that could reasonably be expected of them – for example they have applied for all suitable jobs and undertaken all the activities set out in their work search and work preparation plan - this may be considered sufficient even where the time taken was less than expected.

If this should happen, you will need to review the activities on the plan and set new work related requirements bearing in mind the new requirements will need to utilise the hours available.

It is important to look at the evidence presented by the claimant to ensure the quality of work search and preparation requirements is adequate and the claimant is not just 'skimming' through them (this will be covered in more detail in the WS008 - Work Search Review).



Show Slide 33 – Setting the Work Related Requirements 3/3

The Claimant Commitment contains three sections to record work related activities:

Work Search Activities

- regular ongoing activities that the claimant can reasonably take having regard for their circumstances - may include searching internet jobsites, reviewing local press, applying for relevant vacancies, visits to employers, phoning employers, following up registrations with employment agencies

Work Preparation Actions

- usually time bound activities which will move the claimant closer to work - activities include those that meet any learning and basic skills requirements such as referring, where appropriate, to basic skills assessments and provision, training for CIS/Security Industry Authority (SIA) cards and ESOL provision

Other Work Related Activities

- activities that do not attract any sanction such as

voluntary work, or a course the claimant has undertaken to progress an aspirational goal such as learning French to eventually become a tutor



We will now move on to consider first, the last of these three sections “Work Related Activities”



Show Slide 34 – Setting the Work Related Requirements - Adjustments

Activities which will not have an effect on Availability for Work hours but can be considered by the Work Coach as Work Related Activity:

- part time paid employment
- part time self employment
- activity such as attending a course that will improve the chances of obtaining paid employment
- voluntary work being undertaken by the claimant

This is at the discretion of the Work Coach and should be recorded on the Claimant Commitment.

The Claimant must be prepared to give up all of the activities listed here to take up paid employment to move them over

their individual earnings threshold.

The claimant could also combine paid employment/self employment with another job or increase the hours of their paid employment/self employment to move them over their individual earnings threshold or into Gainful Self Employment.



Self employed work - If you think that the self-employed activity is a viable job goal the hours of availability for Work Related Requirements may be reduced, the relevant deduction must be appropriate for the work undertaken and the payment received.

For example: The Work Coach might decide not to allow any reduction in hours if they feel that the self employment activity is not significant enough, or not appropriate for the claimant's work goals.

Note: A specific interview is held by a Work Coach to make the decision on whether self employment can be deemed to be Gainful Self Employment, this is covered in CS003 - Impacting a Change of Circumstances on Conditionality - Self Employment.

Activities that move the claimant into work must be meaningful.



We will now move on to discuss how voluntary work is taken into account when setting the Work Related Requirements - Adjustments



Refer the learners to Handout 04.01 “Voluntary Work”

When a claimant is undertaking voluntary work the hours that they do can be off set against a maximum of 50% of their expected hours of work search and work preparation activities. See the following examples:

Example 1:

Mary is required to undertake work search and work preparation activities for 35 hours per week. A maximum of 50% (17.5 hours) can be deducted from the work search and work preparation activities that Mary can undertake leaving 17.5 hours a week. As Mary works in Oxfam for 10 hours per week (which is less than 17.5 hours), 10 hours will be deducted from Mary's work search and work preparation activities. Mary will therefore be expected to carry out 25 hours of work search per week.

Example 2:

Ali is required to undertake work search and work preparation activities for 35 hours per week. A maximum of 50% (17.5 hours) can be deducted from the work search

and work preparation activities leaving 17.5 hours per week. But as Ali works in Mind for 20 hours a week which is over the 50% maximum (17.5 hours), only 17.5 hours can be deducted from Ali's work search and work preparation activities. Ali will therefore be expected to carry out 17.5 hours of work search per week.

Note: As WSP does not recognise half hourly increments any deduction to a claimants availability must be rounded **down** to the nearest whole number. Therefore in the example above Ali's availability for work search and work preparation activities will be rounded down to 17 hours. Ali will therefore be expected to carry out 18 hours of work search and work preparation.



After calculating the number of hours a claimant is expected to carry out work search and work preparation activities the Claimant Commitment must be updated. Include details of the voluntary work in the 'Other Work Related Activity' fields in WSP - which will appear on the Claimant commitment when the Work Coach creates the Claimant Commitment.

Example 1 – Mary’s Claimant Commitment must be updated to show 25 hours of agreed work search/work preparation activities.

Example 2 – Ali’s Claimant Commitment must be updated to show 18 hours of agreed work search and work preparation activities.

How to input details of voluntary work and amend the claimants availability for work search/work preparation is covered in the following simulation CS006 - Impacting a Change of Circumstances on a Claimant Commitment, ‘Updating Work Related Activity’.



Lead a discussion to identify learners experiences of the number of hour’s voluntary work, claimants most usually declare. Work through examples given, using information given on Handout 04.01.

This 'relevant deduction' reflects DWP's support of voluntary work as an excellent way for claimants to develop skills which can be transferred to the paid workplace but also ensures that they are spending at least 50% of their work search hours preparing for, searching for, or actually doing paid work.

This does not mean that claimants must stop doing voluntary work for longer than the equivalent of 50% of their expected hours of work – they can continue to do as much voluntary work as they feel they can do as long as they ensure they continue to meet their other work related requirements.

Work search must remain the claimant's primary focus.



Examples of Voluntary work that would be acceptable:

- **The claimant wishes to move into the environmental sector but has no experience. The claimant has started voluntary work with the local Wildlife Trust and there is work in that sector.**
- **The claimant wishes to update their IT and general reception skill, and has volunteered as a receptionist for a local charity.**

- The claimant has started voluntary work as a train driver at a local steam railway charity, although there will probably not be any steam train drivers jobs in the local labour market the claimant will have recent work experience, show a good work ethic and probably have transferable skills that will enhance their CV.

If the Work Coach doesn't agree that volunteering would enhance the claimants employability they will need to inform the claimant that they will have to meet their full conditionality or face a potential sanction to their UC.



Ask the learners “What other examples of voluntary work can you give me, that would be acceptable and why?”



Take feedback from the learners, encouraging them to share their experiences of voluntary work declared by claimants.



Show Slide 35 – Voluntary Work

After inputting details of the Voluntary work into WSP you will need to consider whether the claimant needs more time to attend a job interview or take up paid work. The claimant may be given up to 48 hours to attend an interview and up to one week to take up paid work. Universal Credit policy states this is a discretionary decision for the Work Coach to make based on the facts of the individual decision.

The Intervention regime may also need to be amended so that the voluntary work can be completed. For example if the claimant is doing voluntary work on a Monday, Wednesday and Friday you will need to ensure the claimant has a Work Search Review on a Tuesday or Thursday.



The Work Coach will need to consider any work related support for the claimant.

For example:

The Voluntary work may call for the claimant to have basic food hygiene. The Work Coach may refer the claimant to the food hygiene course that is being run at the local college.



Now that we have discussed “Work Related Activities”, we will now move on to discuss the first and second part of the claimant commitment “Work Search Activities” and “Work Preparation Actions.”



Can you give me an example of what activities you might include against the first part of the claimant commitment, “Work Search Activities.”



Ensure you bring out the following example - “Universal Jobmatch.”

Universal Jobmatch – using Universal Jobmatch (UJ) will form a key aspect of the requirements as suitable claimants will be mandated to setting up and maintaining a record. Not all claimants will be required to use Universal Jobmatch, only those with the skills and knowledge to access and use Universal Jobmatch. You will therefore, need to ensure the claimant knows how to create an online account including uploading a CV, set their preferences and monitor their notifications. For this reason you will need to:

- identify if the claimant has a UJ account. If not, they may be required to set one up
- if the claimant already has a UJ account does the Department have access to it? If not, this will need to be discussed with the claimant.



See Topic 5 - Universal Jobmatch for more information
Remind the learners that although it is a requirement for suitable claimants to have a Universal Jobmatch account whilst seeking work its is not a requirement for them to allow DWP access to their account.



Can you give me an example of what activities you might include against the second part of the Claimant Commitment “Work Preparation Activities”?



Example of an appropriate “Work Preparation requirements for claimants in the All Work Related Requirements group include:

CV – ensuring a claimant has a good quality, up to date CV. This may involve referring the claimant to a CV workshop or providing advice on how the claimant can improve CVs they have.



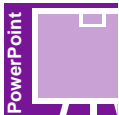
See Topic 6 - Making Work Related Referrals



Show Slide 36 – Work Related Requirements – Sanctions 1/2

The focus in Universal Credit is on setting suitable work related requirements, tailored to the claimant's circumstances. To encourage claimants to meet these requirements they must understand the work related requirements and the sanction consequences of not meeting them.

Sanctions can only be effective in encouraging claimants to meet work related requirements if the possible sanctions they may face are communicated to and understood by the claimant. Evidence shows that claimants are more likely to meet a requirement if they understand they will receive a sanction if they do not. Ensure you explain sanctions when you set a requirement and be clear that if they fail to meet a requirement without a good reason they will receive a sanction. You should explain that a sanction means their Universal Credit payments will be cut.



Show Slide 37 – Work Related Requirements – Sanctions (2/2)

A sanction will cut a claimant's Universal Credit payment by a daily amount.

That daily amount and how long the cut could last is recorded on the Claimant Commitment. Further details are in the Commitment Pack. You should draw this information to the claimant's attention and explain it to them.

Where a claimant is aware that a requirement is mandatory but nevertheless fails without a good reason to meet a suitable requirement that was clearly notified to them then a sanction doubt should be raised.



Show Slide 38 – Work Related Requirements – Claimants in Work (1/3)

Intensive labour market interventions and associated support are provided to claimants in the All Work Related Requirements Group who are earning less than the weekly administrative threshold.

Every AWRR group claimant supported by Work Coaches will have a clear responsibility to find and secure work that gives them a weekly income *above* their upper conditionality threshold (normally 35 x National Minimum Wage).

However claimants have an incentive under Universal Credit to take up any paid work.

This means that if a claimant moves into paid work and earns more than the relevant administrative threshold but less than their upper conditionality threshold, they remain in the AWRR group but are exempt from the intensive JSA style interventions regime (**sometimes referred to as the Working, Could do More Group**).



Reminder - The administrative threshold is £330 for single people and £525 for couples per month.

The upper earnings threshold is the claimant's hours of availability for work (usually 35) x National Minimum Wage.



Show Slide 39 – Work Related Requirements – Claimants in work (2/3)

The longer-term vision under Universal Credit is to remove the administrative threshold and provide Labour Market support to all claimants in the AWRR group who are earning less than the upper conditionality earnings threshold.

Work Coaches can decide whether they continue to work with and support claimants who they help move into the 'Working, Could do More' group. A Work Coach might decide to continue to support a claimant for a variety of reasons for example, the work could be only temporary or,

with a small amount of further assistance, the claimant could earn more.

Work Related Requirements – Claimants in Work (cont)

The approach that Work Services takes with these claimants in the early stages will be significantly influenced by local office and district decisions and you could well be expected to do more, within existing Freedoms and Flexibilities.



Show Slide 40– Work Related Requirements – Claimants in Work (3/3)

If a Work Coach continues to support a claimant in the 'Working, Could do More' group then they will need to:

- engage the claimant to revise and set an alternative Claimant Commitment for the claimant reflecting their new circumstances;
- discuss further activity to help the claimant increase their earnings;
- determine which Work Preparation activities might be appropriate; and
- choose how and when you want to see the claimant again.

It must also be noted that Work Search requirements on AWRR claimants who have earnings above £76 cannot be

legally imposed. They will also not be subject to fortnightly Work Search Reviews.

However Work Preparation requirements and mandatory interviews which can both attract sanctions can be applied.

Beyond this, each office or local area may choose to offer additional support for this claimant group. This will be communicated locally.



Please note the amount given in this slide is correct as at May 2013.



Show Slide 41 – Determining the Intervention Regime

When determining the Work Search Review timescales, the following should be considered:

- WSP allocates the first WSR following Initial WSI as one week later
- minimum fortnightly face to face is required
- can be more frequent and this additional contact can be by other means e.g. Telephone, email, SMS
- other follow up by the Assistant Coach can be more frequent and this additional contact can be by other means e.g. Telephone, email, SMS



WSP has been programmed to offer the first intervention for the week following the Initial WSI & UC outlets have been asked not to change it as in some cases, despite the change, WSP marks claimant intervention FTA for the date it originally offered, i.e. 1st WSR offered 4/09, Work coach changes it to 11/09 on WSP, on 05/09 claimant's WSP intervention shows "FTA" even though not really expected until the following week.

Also (as at 04/09/13), WSP allows Work Coaches to book intervention slots over & above the number of claimants allocated to that time slot. Work Coaches need to refer to local practice to see how the office is working around this. (i.e. workaround to avoid offices booking 15 UC claimants in to attend a WSR slot when they only have 2 Assistant Work Coaches in place.)



Show Slide 42 – Determining the Intervention Regime (cont)

You will need to decide on an appropriate Work Search Interview regime for the claimant. This regime will consist of a tailored level of contact, which could be a combination of telephone, electronic communication and face to face interviews.

Determining when next to see the claimant for subsequent Work Service Interviews is based on several factors:

- the claimants capability to undertake self managed work search and work preparation,
- a judgement you make about claimants motivation to do everything they can to find work,
- challenges faced by the claimant,
- how long the agreed specific actions will take (time bound activities).



Freedoms and Flexibility currently determine frequency. This remains the same but the channel shift strategy means a move from face to face interviews to digital i.e. telephone, SMS etc.

At least 50% of UC claimants will receive the additional support of Weekly Work Search Reviews which will be set at the discretion of the Work Coach.

At each Work Search Review, consideration is given as to whether Weekly Work Search Reviews remain appropriate or whether the claimant is to revert to fortnightly Work Search Reviews, provided the 50% ratio is maintained overall.

A potential contingency option , if a reduced budget is agreed, is to introduce weekly Reviews with a Work Coach from the 13 week stage for the 25 plus age group)

Setting the Intervention Regime

After determining the Intervention Regime, explain to the claimant when they will next be contacted (if appropriate) and when they will next be seen face to face, who the interview is with (i.e. Work Coach or Assistant Work Coach) and the purpose of the next review.

The next Work Search Interview appointment will be booked on WSP and the Work Search Review appointment details will be documented in the Commitment Pack.

After setting the Intervention Regime you will need to set a Task for 11 weeks, for the 1st quarterly review to be conducted at week 13. This task is set to mature at week 11 to prompt you to contact the claimant and book the appointment on WSP.

The Task should include the following information:

- Task: Action required
- Subject header: Quarterly WSI required
- Body: Quarterly WSI due, day/month/year
- Maturity: 2 week before WSI date
- Audience: Owning Work Coach

The Quarterly Work Search Interview is due 11 weeks from the initial date of claim.



Booking an appointment on WSP is covered in WS006 – Universal Credit Diary Management on WSP.

Learning on the Commitment Pack is covered later in this module.

The Commitment Pack is issued to the claimant at the Initial Work Search Interview; it goes hand in hand with the Claimant Commitment.

It has the following sections:

- **Personal Statement**
- **About me (cut and pasted from Claimant Record)**
- **Attendance**
- **Sanction details**
- **Evidence Requirement.**

The Commitment Pack details the claimant's circumstances that have been taken into account when setting the Claimant Commitment and focuses on what they can do around these circumstances and not on what they cannot do.



Show Slide 43 – Treatment of Holidays

There is no specific holiday allowance under Universal Credit conditionality. Claimants must continue to carry out the work related requirements set out in their Claimant Commitment. For claimants in the All Work Related Requirements group this includes ensuring that they are available to attend a job interview or take up an offer of employment even if this means cutting short a holiday.

Being on holiday would not be considered good reason for not carrying out any work search or availability requirement and claimants would go on holiday at their own risk.

Claimants must be robustly monitored to ensure compliance with their work related requirements e.g. no allowance would be made to reschedule work search reviews or interviews.

The physical whereabouts of claimants will not be monitored – as long as they are present at mandatory interviews etc. However there should be no interruption to the expectations placed upon the claimant. The claimant is free to organise what they do with their own time/e.g. how they accommodate work search expectations.

No exceptions should be made for pre-booked holidays.

Topic Summary



Show Slide 44 – Topic Summary

In this topic you have learned how to:

- consider and set work related requirements
- consider and set the Intervention Regime

Topic 5 - Using Universal Jobmatch for Work Search



Show Slide 01 – Using Universal Jobmatch for Work Search



Show Slide 02 – Topic Aims and Objectives

Aims

This topic aims to provide you with the skills and knowledge to be able to discuss the use of Universal Jobmatch with a claimant and to be able to update WSP to show the claimant has set up a Universal Jobmatch account and if so if they have granted DWP access .

Objectives

By the end of this topic, with the aid of any reference material, you will be able to:

- effectively advise and encourage claimants to set up and use Universal Jobmatch for Jobsearch activity.
- encourage claimants to allow the Department access to their Universal Jobmatch account.
- update WSP to show that the claimant has set up a

Universal Jobmatch account.

- update WSP to indicate whether or not access has been granted to a Universal Jobmatch account
- explain to the claimant the benefits of allowing DWP access to their Universal Jobmatch account
- explain the implications of not allowing DWP access to their Universal Jobmatch account



Show Slide 03 – Topic Aims and Objectives (cont)

- advise the claimant how to grant DWP access to their Universal Jobmatch account
- advise the claimant how to notify DWP of their Universal Jobmatch ID number when they grant DWP access to their Universal Jobmatch account
- determine if the claimant agrees, or not, to allow DWP access to their Universal Jobmatch account
- explain the help and support available to claimants who do not have internet access and/or internet experience, including supported use of the Internet Access Device

- set a task to review DWP access to the claimant's Universal Jobmatch account; and
- update WSP with the claimant's Universal Jobmatch status.



Show Slide 04 – Initial Work Search Interview – Universal Jobmatch

Universal Jobmatch will be discussed with the claimant at the Initial Work Search Interview.

Claimants who do not already hold a Universal Jobmatch account will be advised of the requirement to set one up if they have the skills and ability to do this.

When discussing a Universal Jobmatch account it is vital that the Cookies factsheet is issued to the claimant so they are able to make an informed decision about their choices relating to cookies. A claimant will usually be expected to use a DWP Internet access Device (IAD) if they do not want to accept cookies on their own device or other non DWP IAD.



The Cookies factsheet is available in English and Welsh and can be located via:

Operational Guidance >> Universal Jobmatch Toolkit >> Chapter 03 – Using Universal Jobmatch, paragraph 66.

You may also issue the 'How to Use Universal Jobmatch' leaflet, which is available in [English](#) and [Welsh](#) if you think it will help the claimant understand how to register and login to their account.



Show Slide 05 – Universal Jobmatch

Universal Jobmatch is available to all people looking for work whether they are claiming benefits or in work.

As part of the work preparation requirement of the Claimant Commitment a claimant must create, where they are able, a profile and CV on Universal Jobmatch.

Therefore, it is important that you understand the key features and benefits of using the service so that you can explain Universal Jobmatch to claimants.



Learners may already be familiar with Universal Jobmatch and how it is used. This learning reinforces the benefits of Universal Jobmatch to Universal Credit claimants.

Depending on the experience of learners, consider asking the following question.



What are the benefits of creating a profile and public CV in Universal Jobmatch, to the claimant?



Benefits of creating a profile and public CV in Universal Jobmatch, to the claimant are shown on the next two slides (see below)



Show Slide 06 – Benefits of creating a profile and public CV in Universal Jobmatch

The messages you should be including in your conversation with claimants are:

- Universal Jobmatch will make your job search quicker and easier
- you can access the service at a time to suit you, 24 hours a day, seven days a week and it's free (but usual internet provider's charges will apply)
- you will be able to log on to your account from a home computer or anywhere with internet access
- Universal Jobmatch uses the latest job search and matching technology to help find jobs that are right for you
- you can create and manage your own account online, and tailor your preferences to suit the job

you are looking for

- assistance in learning how to use Universal Jobmatch can be given in the Jobcentre when using the Internet access Device (IAD) and/or at the local Work Club, or by attending a short course where providers offer this provision
- assisted job search can be provided in the jobcentre if you require additional support to use our services



Coaching a claimant with little or no experience of using the internet, if they have the ability to learn, is an important factor in increasing IT skills as well as the benefit for the claimant in record keeping and Work Coach/Assistant Work Coach with reviewing work search activity for the work related requirements.

The Work Coach may need to talk to their Line Manager about which form of assistance should be promoted within their own office and the availability of courses run by providers.



Show Slide 07 – Benefits of creating a profile and public CV in Universal Jobmatch (cont)

- you can apply for most jobs online, giving you

more time to spend on the actual applications.

- there is help available via a help tool within Universal Jobmatch to create a CV, or you can upload one you already have.
- your CV will be automatically matched with suitable jobs and sent to the company.
- you will receive alerts to notify you when new jobs are posted that match your job search.
- you can also record details about other job searches you do, so that all your job search activities will be in one place.
- Universal Jobmatch service is available in Welsh (if required).



Again if learners are already familiar with Universal Jobmatch and how it is used, consider asking the following question.



What are the benefits to claimants of allowing DWP access to view their account?



Benefits to claimants of allowing DWP access to view their account are on the next two slides (see over)



Show Slide 08 – Benefits to claimants of allowing DWP access to view their account

Benefits of allowing DWP access to claimants Universal Jobmatch account include:

- it will make it easier for their Work Coach/Assistant Work Coach (because they will be able view their Universal Jobmatch account information directly) to give them extra help to improve their chances of being matched to a job.
- For example their Work Coach/Assistant Work Coach can help them:
 - improve the matches they get by reviewing their profile or public CV
 - identify any skills gap and/or training needs
 - discuss how they can refine their public CV
 - with job search if they are identified as requiring additional support to enable them to use our services



Show Slide 09 – Benefits to claimants of allowing DWP access to view their account (cont'd)

You can also tell the claimant:

- they will not have to provide evidence of their jobsearch activity on Universal Jobmatch when they attend their Work Search Review as DWP will be able to view this activity online
- if they allow DWP access, they can change it back at any time to not allow DWP access



Although claimants will not be required to provide evidence of jobsearch on UJ, they will be required to provide of any other jobsearch activity taken.

The following leaflets are available on the intranet to help claimants get the most out of their UJ account. They can be emailed or printed off to share with claimants as appropriate:

- **Benefits of opening a Universal Jobmatch account**
- **Safety and security when looking for work**
- **How to build a CV on Universal Jobmatch factsheet**
- **Cover Letter Library on Universal Jobmatch**



Show Slide 10 – Claimant Agrees to Create Universal Jobmatch Account

You should advise claimants who do not have a Universal Jobmatch account to register for a Government Gateway Account via GOV.UK and create a profile and CV on Universal Jobmatch.

If the jobseeker already has a Government Gateway account they need to access www.gov.uk/jobsearch and select the 'Login to Universal Jobmatch' link which will launch the 'Universal Jobmatch Login' page. The jobseeker then enters their 'User ID' and 'Password' and selects 'Log in'.

Universal Jobmatch can be accessed via GOV.UK using an internet enabled computer or smartphone although access via the mobile app will only enable claimants to run anonymous job searches.



Claimants will be able to search and view jobs, set up an account and build and upload their CV. Claimants will receive automatic matches to employers jobs from the 'Profile' they created. These job matches will be put into their 'Recommended Jobs' page in Universal Jobmatch. Universal Jobmatch will also search through their CV and make a match back to the company.



Show Slide 11 – Next Steps – Agreeing a Target Date

You should agree with the claimant a target date for them to create their Universal Jobmatch account.

It is important that you explain to the claimant the consequences of not doing this.

The consequences of failing to create a profile and CV in Universal Jobmatch could lead to the claimant being sanctioned.

Once this date is agreed update WSP with the agreed date.



The requirement to create a profile and CV in Universal Jobmatch should only be placed on appropriate claimants, e.g. if they have the skills and knowledge to access Universal Jobmatch. It should not be placed on claimants who are unable to use digital services.

Simulation – Universal Jobmatch



Show Slide 12 – Universal Jobmatch



To view the simulations please refer the learners to the **Universal Credit Simulations and Screenshot Walkthroughs intranet page** which is within the **Learners Support Site**.

http://intranet/1/jcp/directorates/hr/learning/coursesandproducts/dwp_t750753.asp

The learners should scroll down to **WS017 Initial Work Search Interview** and select the See It, Try It or Know It links for the **Universal Jobmatch simulation**. Note the information at the top of this intranet page which describes how to use the hyperlinks.

Allow the learners 10 minutes to complete this simulation



Show Slide 13 – Booking Follow Up Appointment

Once you have agreed a date with the claimant and you have updated WSP, you need to make an appointment with the claimant to ensure all the agreed follow-up action has been taken.

You should explain to the claimant that if they fail to meet the requirements by the date specified a low level sanction will apply. This means the sanction will comprise of an open-ended period (which runs until they meet the requirement) followed by a fixed period of up to twenty eight days.



Booking an Appointment is covered in the WS006 – Diary Management on WSP.



Show Slide 14 – Objections to Setting up Universal Jobmatch Account

For the majority of claimants, creating a profile and CV in Universal Jobmatch will be an important part of improving their employment prospects.

However, actually creating a profile and CV and using the service may be less than straightforward for some



Can you think of some examples when this might be the case?



Examples when creating a profile and CV and using the service may be less than straightforward for some claimants include those claimants:

- with a learning or other health-related condition; or
- for whom English is their second language; or
- who lack appropriate literacy and/or numeracy skills; or
- living within an area of very limited or no broadband service where travel to a good reception area is not practical.

This list is not exhaustive

If one or more of the above circumstances apply you may deem it is unreasonable for the claimant to use Universal Jobmatch.



Show Slide 15 Extra Support to Access and/or Use Universal Jobmatch

When a claimant does not have regular access to the internet at home you should offer them access to the Internet Access Devices (IAD). You should also talk to them about facilities available at their local library and/or Work Club (where these exist) or possible access through friends and family.



Show Slide 16 – Extra Support to Access and/or Use Universal Jobmatch (cont'd)

Where the claimant is inexperienced in using the internet and requires extra support you will either:

- book the claimant onto suitable Universal Jobmatch support provision, where this is available; or
- discuss and agree mutually acceptable dates for the different actions to be completed with coaching on the IAD/at the Work Club (the dates will depend on the claimant's circumstances and how you decide to break down the tasks based on any experience the claimant does have). Remember you do not have to set dates according to the next face to face appointment,

you can agree to communicate by e-mail or telephone for example.

You will need to set a task on Work Services Platform (WSP) to review the progress on the actions you set.

It is suggested that you book the first IAD appointment(s) clerically using local arrangements, making sure a member of staff will be available to coach the claimant.



Setting a task in WSP can be found in WS12 - Basic Navigation and Maintaining a Claimant Record on WSP.

Where there is no provision available to support claimants with little or no internet experience to use UJ, here is an example of breaking down actions into manageable stages as time-bound activities:

1. register and open a Universal Jobmatch account, learn how to navigate the site and apply for suitable vacancies which offer an option of applying without an electronic application - within 4 days; create/update and upload a basic CV and begin applying for suitable vacancies using UJ facilities - within 7 days, etc.



Show Slide 17 – Discuss Objections with the Claimant

There may also be occasions where a claimant will not willingly create a profile and CV in Universal Jobmatch.

You should discuss the claimant's objections and where possible look for solutions.

A claimant may not be willing to create a profile and CV in Universal Jobmatch as they do not have their own computer. You should explain to the claimant that they must use one of the Internet Access Devices (IAD) in the Jobcentre.

It is important that you explain to the claimant the consequences of not creating a profile and CV in Universal Jobmatch. The consequence of failing to create a profile and CV in Universal Jobmatch could lead to the claimant being sanctioned.



Show Slide 18 – Universal Jobmatch Not Suitable for Claimant

After taking consideration of the reasons a claimant is unable to create a profile and CV on Universal Jobmatch you may make the decision that a Universal Jobmatch account is not suitable. In this case you must update the claimant's WSP record.

You may record for example, “Claimant not using Universal Jobmatch – English as a second language” on WSP.



Although you may decide at this point Universal Jobmatch is not suitable for the claimant, the claimant must be advised that in the future they will be required to create a profile and CV on Universal Jobmatch.

This subject is covered later in this learning.

You will now move on to look at the implications of not allowing DWP access to their Universal Jobmatch account.



Show Slide 19 – Implications of Not Allowing DWP Access

You should explain the implications of not allowing DWP access to their Universal Jobmatch account.

The consequences of not allowing DWP access to a Universal Jobmatch account may include consideration of More Frequent Attendance (MFA) and supplying clerical evidence of in-depth work search activity.



Show Slide 20 – Granting DWP Access and Notifying DWP

You need to explain to the claimant that if they wish to grant DWP access to their Universal Jobmatch account, how they can do so.

To grant DWP access to a claimant's Universal Jobmatch account. The claimant must:

- logon to their Universal Jobmatch account
- select profile from the top menu
- tick the check box against "I authorise DWP to view my accounts including my job search activity, feedback and notes"
- save the changes

When a claimant has granted DWP access to their Universal Jobmatch account they should advise the Work Coach that access has been granted by either:

- email
- at their next intervention/interview
- telephone

The date and form of contact should be as agreed between

the claimant and Work Coach. You will need to set yourself a task on WSP to follow this up.



Show Slide 21 – Updating WSP with Universal Jobmatch Details

When a claimant has granted DWP access to their Universal Jobmatch account you must update WSP.

To update WSP you will need the Claimants Universal Jobmatch ID Number (UJ ID Number).

You can find a Claimants UJ ID Number by accessing their Universal Jobmatch Account and searching for the Claimants account using:-

- Claimant's email address
- Claimant's Phone number
- Surname
- First name



Learners can find further Guidance on Accessing Universal Jobmatch in:-

**Operational Guidance >> Universal Jobmatch Toolkit
>> Chapter 03 – Using Universal Jobmatch**

Inform Learners that once the Claimant's UJ ID Number is known and WSP is updated, they can use it to access the Claimants Universal Jobmatch Account when required.



Show Slide 22 – Updating WSP with Universal Jobmatch Details Cont'd

To record that a claimant has granted DWP access to their Universal Jobmatch account you must update the TLMS field located in the Claimant screen, with the Personal tab expanded.



Universal Jobmatch is the new name that replaces the internal working name for Transforming Labour Market Services (TLMS).



Show Slide 23 – Updating WSP with Universal Jobmatch Account Number

To record that a claimant has provided access to their Universal Jobmatch account number you must update the TLMS User ID field.



Show Slide 24 – Universal Jobmatch Account Details Updated - Save

Once the claimant's WSP account has been updated with the claimant's Universal Jobmatch account number you will save and close the WSP account.

The Save and Close button is at the top left hand side of the Claimant screen, with the Personal Tab Expanded.



You have now completed the action required when a claimant has granted DWP access to their Universal Jobmatch account and has provided their Universal Jobmatch account number.



Show Slide 25 – Access to Universal Jobmatch Account Not Given

There may be occasions when a claimant does not grant DWP access to their Universal Jobmatch account.

You will also need to explain, that because the claimant does not wish to allow DWP access to their account, each time they attend in the future they will be required to produce evidence of their job search.

Remember - you cannot mandate a claimant to give us access to their account, this is their decision not ours.

If a claimant refuses to give us access to their account, you would update the WSP TLMS status drop down menu to “Has account but refuses to give access to DWP” and the reasons for refusal in the Notes.



Show Slide 26– Access to Universal Jobmatch Account Not Given (cont'd)

At this point the claimant has not given DWP access to their Universal Jobmatch account.

This does not mean that the subject will not be discussed again with the claimant.

Whenever contact is made with the claimant the opportunity should be taken to discuss with them giving DWP access to their Universal Jobmatch account.

When the claimant gives DWP access to their Universal Jobmatch account the claimant's WSP account is updated.

Topic Summary



Show Slide 27 – Topic Summary

In this topic you have learned how to:

- effectively advise and encourage claimants to set up and use Universal Jobmatch for Jobsearch activity.
- encourage claimants to allow the Department access to their Universal Jobmatch account.
- update WSP to show that the claimant has set up a Universal Jobmatch account.
- update WSP to indicate whether or not access has been granted to a Universal Jobmatch account
- access the claimant's Universal Jobmatch account to review their Job search
- the benefits of allowing DWP access to their Universal Jobmatch account
- the implications of not allowing DWP access to their Universal Jobmatch account
- advise the claimant how to grant DWP access to their

Universal Jobmatch account

- advise the claimant how to notify DWP of their Universal Jobmatch ID number when they grant DWP access to their Universal Jobmatch account
- determine if the claimant agrees, or not, to allow DWP access to their Universal Jobmatch account



Show Slide 28 – Summary (cont'd)

In this topic you have learned how to:

- explain the help and support available to claimants who do not have internet access and/or internet experience, including supported use of the Internet Access Device
- set a task to review DWP access to the claimant's Universal Jobmatch account
- update WSP with the claimant's Universal Jobmatch status