

This video will show you how to generate a statement. Statements provide the claimant with a breakdown of their Universal Credit award. To create a statement select Create agent to-do and then the Generate statement template.

**Agent selects 'Create agent to-do' and 'Generate statement' from the drop-down.**

For the date due enter today's date. This gives the to-do a date to be completed by. This cannot be a date in the past. There is no need to enter a time due. Once you have input the date select create to-do.

**Agent enters date and selects 'Create to-do.' The 'Generate statement – select a date' screen is displayed.**

For the next date input any day that falls within the assessment period you want to generate the statement for. For this example, the assessment period I want to generate a statement for is the 15<sup>th</sup> January 2021 to the 14<sup>th</sup> February 2021. I will use the 15<sup>th</sup> January as this is the first date of this assessment period. Once you have input the date, select find. The next screen allows you to enter the information you need to create the statement.

**Agent enters 15<sup>th</sup> January 2021 and selects 'Find'. The 'Statement' screen for the claimant is displayed.**

You should complete this using the information from the Universal Credit Assessment Tool. The easiest way to arrange your screen when completing the to-do is to split your screen. You will have been shown how to do this in previous modules.

**Agent splits the screen showing the 'Statement' screen on the left and 'Universal Credit Agent Led Process Summary' on the right .**

As you can see, this means the service and the summary are both visible on the screen. So now we will enter the information needed to generate the statement. This claimant's standard allowance is £409.89.

**Agent enters £409.89 into 'Standard allowance' on the 'Statement' screen.**

The housing total amount is £366.17 which is all rent. There are no service charges. This can be double checked within the claimant information within the service.

**Agent enters £366.17 into housing rent on the 'Statement' screen.**

The claimant has one child which they received £281.25 for.

**Agent enters £281.35 and 1 child into 'Children' on the 'Statement' screen.**

There are no disabled children. No children in care. They are not a carer. They do not have limited capability for work or work related activities, and as they did not receive severe disability premium on any previous benefit, there is no transitional protection, so we do not need to enter any information into any of these boxes.

**Agent enters '0' into the boxes for 'Disabled children', 'Children in childcare', 'Carer'.**

The default setting for work capability is 'Neither of these'. You would only need to change it if the claimant had 'Limited capability for work' or 'Limited capability for work and work-related activities'. The total before adjustments for this claimant is £1057.31.

**The 'Universal Credit Agent Led Process Summary' screen on the right shows the 'Total before adjustments' as £1057.31.**

From the summary, we can see that there are no adjustments to be made for this claimant, as they have no take home pay, no income from savings or capital, no income from other benefits or overlapping benefits. They have no savings and investment over £6,000. Also, the benefit cap does not apply to this claimant, so you would select no.

**Agent selects 'No' to 'Does the benefit cap apply' on the statement.**

The claimant also does not have any fraud penalties, sanctions, advances, deductions, or payments to a landlord. So, for all these boxes, we would just leave them blank.

So, the claimant's total payment for this month, as shown on the Universal Credit Assessment tool summary, is £1057.31.

**Agent enters £1057.31 into 'Total payment for this month' on the statement.**

Once you have entered these amounts, select done and this will generate the statement. You can then see this within the claimants account. Select Claimant account, payments, and it will show payment due and a complete breakdown of that payment, This can then be printed if the claimant needs to, to show proof of benefits.