



UC27 Calculation of payments

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Important information

Topic	Topic title	Duration
All topics		90 minutes
Total duration of all topics		90 minutes

Job role	Learning required	Duration
Case manager Case manager team leader	All topics	90 minutes



This learning uses the Universal Credit assessment tool. It is recommended that you make yourself familiar with the tool in order to answer any questions.

Module aim and objectives



Show slide 01 – Calculation of payments



Show slide 02 – Module Aim and Objectives

Please allow the learners time to read through the Aim and Objectives on the slide.

Introduction



Show slide 03 – Introduction

Autocalc is the automatic calculation of entitlement for Universal Credit. This generates a to-do and we use the data captured at the end of the claimant's assessment period to check the calculation before payment is issued.

Autopay is the automatic payment of Universal Credit without any intervention from an agent.

Approximately 95% of cases are calculated automatically. The remaining 5% will need a manual calculation.

Payment Blockers



Show slide 04 – Agent homepage overview

Not clearing to-dos in time can result in missed payments. These are payment blocking to-dos.

The agent homepage overview displays key information to support you with managing and prioritising work. It displays and lists how many claims have payment blocking to-dos.

Once the to-dos are cleared the service will release payment.



It is your priority to action all the outstanding to-dos you can on a claim before a payment is made to ensure it is accurate.

Not all outstanding payment blocker to-dos can be cleared by you. Some may be waiting for claimant action.

Your priority is to action all the outstanding to-dos you can on a claim to make sure payment is accurate.



Allow 5 minutes for this activity

On a whiteboard ask the learners to list any to-dos they think will block payment if not completed.

A full list of answers is on the following slide.



Show slide 05 – Payment blocker to-dos

Autocalc



Show slide 06 – Check automated calculation

This slide is animated. Select to reveal the statements

Once payment has been calculated, the service will generate a **Check automated calculation** to-do. You must check the right information has been used and the correct amount of Universal Credit has been calculated.

The **Check automated calculation** to-do appears the day after the claimants AP ends and will show the calculation ready to be approved or rejected.



Where you identify during 'Check automated calculation' to-do activity that a claim is awaiting closure action, which has not yet been taken (moving abroad for example), or a formal suspension you will take the action to close the claim.

The 'Check automated calculation' to-do will generate every month until claim closure action is complete.



Show slide 07 – In-depth check

This slide is animated. Select to reveal the points below.

You are not required to do an in-depth check; you should accept the autocalc unless any of the following apply:

- the service has generated an autocalc however, due to deductions, it has resulted in a minus figure
- it is an arrears calculation only
- when the award contains non-standard housing, shared ownership or support for mortgage interest

Where the calculation is correct, select 'Yes' on the Check automated calculation to-do. The service will generate a payment using the Central Payment System (CPS) in the majority of cases.

If CPS is not used, as the to-dos are cleared you will be directed to Make a payment to-do. Which we will cover this later in the learning.

If you cannot accept the autocalc, reject the calculation in the **Check automated calculation** to-do. This will create a **calculate payment** to-do.

Manual calculations



Show slide 08 – Manual calculations

This slide is animated. Select to reveal the points below.

The service is not currently able to automatically calculate the payment where there is:

- housing with shared ownership
- non-standard housing
- an arrears calculation only
- a minus figure showing in the calculation

These will require a manual calculation. To do this you need to use the Universal Credit assessment tool. This can be found in the resources section of Universal Learning.



Information can be found on non-standard housing in Universal Learning.



The activity below uses the Universal Credit assessment tool. Learners may find that the tool does not fit the screen. For amendments to the calculator learners will need to raise an Agent Contact Template (ACT).



Allow **10** minutes.

Issue the learners Activity sheet – Manual calculations and ask them to access the Universal Credit assessment tool.

Using the information on the activity sheet the learners should complete the calculator for the stated AP.

Once learners have completed the calculator ask them to select the summary tab.

Using UC27 Teddy Riley calculation check that the learners have received the same answers.



Deductions need to be included in the tool if applicable. If required, learners can find information in Universal Learning.

Home > Organisation > Work and Health Services Group > Universal Credit HUB > Universal Learning > Payment and

Sanctions > Deductions > [Deductions](#)



The **Calculate payment** to-do contains all the claimant information and a link to advice for the agent to complete the to-do.



Show slide 09 – Manual calculator upload

Once you have completed the tool, upload it to the **Calculate payment** to-do and email it to your quality assurance or payment accuracy team to check the calculation.



Advise the learners to check with their SILs for the email address, and what must be included in the email subject line.

If they agree, clear the **Calculate payment to-do**. This will automatically generate the **Make a payment to-do**.

If the quality assurance or payment accuracy team disagree examine their advice. If you agree create a new assessment tool calculation and upload to the service.

If you disagree, you are able to challenge the quality assurance or payment accuracy team's findings at any time in the process.

Finalising payments



Show slide 10 – Make a payment to-do

The Make a payment to-do includes an ALP with full Central Payment System (CPS) instructions.

It is essential that you always follow the ALP as it contains the correct CPS input codes. Even if you are an experienced CPS user, you must follow the steps in the ALP.

Once the payment is recorded in CPS, email your team leader to ask them to authorise the payment. You must leave the Make a payment to-do open as the team leader will take the action to clear it.

So the claimant can see a breakdown of their payment you will need to generate a statement for them. Completing the **Calculate a payment** to-do will generate the statement for you to complete.

For the training I am going to send you a video link showing how to manually create and complete the statement.



The following video shows you how to manually create a statement and complete it.

Share the link with the learners.

https://dwp.streamamg.com/embed.html?entry_id=0_wscq6fmo

Continued on following page.



The video is 5 minutes and 17 seconds long.

Allow the learners to watch the video and answer any questions before moving on.



In the event the video link does not work you can share your desktop to demonstrate.

Share the training service:

- access a claim you have made that has passed the first AP
- select **Create agent to-do**
- select the template **Generate statement**
- input today as the due date
- select **Create to-do**
- enter the date **15 February 2021**
- select **Find**
- using the details on UC27 Teddy Riley calculation complete the statement
- select **Done**

The claimant can print their statement if they need to provide proof of entitlement to outside organisations.

Where claimants have payments that are more frequently in place (twice monthly only) their account home page, payments page and statement will show:

- the amount of the two half payments

- the date when each payment is due

The total monthly payment amount will be displayed at the bottom of the statement.

Summary



Show slide 11 – Summary

Allow learners time to read through the summary on the slide.