Move to Universal Credit (managed migration): Guidance

Contents

Introduction

Universal Credit is replacing the following Legacy benefits:
- Child Tax Credit
- Working Tax Credit
- Housing Benefit
- Income Support
- income-based Jobseeker's Allowance (JSA)
- income-related Employment and Support Allowance (ESA)

Many claimants will claim Universal Credit naturally when they have a change in circumstances which would have previously resulted in them needing to make a new claim to a Legacy benefit. However, it is now not possible to make a new claim for
- income-based JSA
- income-related ESA
- Housing Benefit
- Income Support
- Tax Credits

Any change of circumstances resulting in a new claim would mean that the claimant must claim Universal Credit. At which point, their claim to any existing Legacy benefits would end.

Circumstances meaning that a claimant must make a new claim will remain the same, for example a change:
- of employment status
- in health or family circumstances
- of local authority (if they claim Housing Benefit)

If a claimant has not claimed Universal Credit already due to a change of circumstances, they are now being directed to do so as part of 'Move to Universal Credit (managed migration)'.

Managed migration process

Claimants selected for managed migration are informed that they must claim Universal Credit in order to maintain their benefit entitlement.

Migration Notice

They will receive a migration notice letter in the post which explains that their Legacy benefits are ending and how to make a claim to Universal Credit by a specific date.

This deadline date is 3 months and 1 day from the date the migration notice is sent (for example, if the migration notice is issued on 25 May, the deadline date is the 26 August).

Reminders

Claimants are also issued reminder notices by letter and text to ensure that they make a claim by their deadline and understand all the support which is available to them.

Claim made

Once their claim to Universal Credit has been made, their migrating legacy benefits will be stopped.

Any Tax Credit payments will stop straight away.

The following benefits will continue to be paid for a further 2 weeks before stopping:

- Jobseeker's Allowance (Income-based)
- Employment and Support Allowance (Income-related)
- Housing Benefit
- Income Support

These payments will not be deducted from the claimant's Universal Credit.

Claimants who make a claim by their deadline or within 1 month of their deadline date passing will be eligible to be considered for Transitional Protection. See 'No claim made by the deadline date'

No claim made by deadline

The claimant's entitlement to their migrating legacy benefits will end from the deadline on their Migration Notice.

Any Tax Credit payments will stop straight away.

The following benefits will continue to be paid for a further 2 weeks before stopping:
- Jobseeker's Allowance (Income-based)
- Employment and Support Allowance (Income-related)
- Housing Benefit
- Income Support

If the claimant makes a Universal Credit claim within one assessment period of their claim-by date passing, their Universal Credit claim date will be backdated to the claim by date. These claimants can still be eligible for Transitional Protection, if applicable.

See Move to Universal Credit (managed migration): Transitional Protection: Eligibility for further detail and what entitlement to transitional protection means you are eligible to be considered for.

Rollout of Move to Universal Credit (managed migration)

Move to Universal Credit (managed migration) is now underway across all Jobcentre districts within Great Britain. The remaining groups of households receiving legacy benefits will be migrated to Universal Credit, excluding Employment and Support Allowance only and Employment and Support Allowance (IR) with Housing Benefit.

Rollout schedule

Income Support claimants	Starting in April 2024
Tax Credit claimants who are also claiming Housing Benefit	Starting in April 2024
Claimants in receipt of Housing Benefit only	Starting in June 2024
Employment and Support Allowance (Income-related) claimants who are also receiving Child Tax Credit	Starting in July 2024
Jobseeker's Allowance (Income-based) claimants	Starting in September 2024

Households could be in receipt of a combination of benefits. For example, a claimant may be in receipt of Income Support and Tax Credits, and they would be sent a Migration Notice along with all other Income Support claimants.

From August 2024, those claiming Tax Credits who are over state pension age will also be contacted. These households will be asked to apply for either Universal Credit or Pension Credit, depending on their circumstances.

When Legacy benefit payments stop

Claimants who have been mandated to claim as part of 'Move to Universal Credit (managed migration)' will continue to be paid the following benefits either for a further 2 weeks after they have made their claim, or when their deadline date passes:

- Income Support
- income-based JSA
- income-related ESA
- Housing Benefit

For those who make a claim for Universal Credit, the 2-week period will start from the day before the claim was made and will not be deducted from any future payments.

For those who do not make a claim by their deadline date, the 2-week period will start from the day before the deadline date.

Working Tax Credit and Child Tax Credit eligibility will stop from the day before the claimant's deadline date (where no claim has been made) or the day before a claim was made.

Transitional Protection

For more information, see Move to Universal Credit (managed migration) Transitional Protection Additional Amount: eligibility and Transitional Protection additional amount calculation

Transitional Capital Disregard

The Transitional Capital Disregard enables eligible 'Move to Universal Credit (managed migration)' Tax Credit only claimants with over £16.000 in capital to claim Universal Credit for up to 12 assessment periods.

For the disregard eligibility criteria, see Move to Universal Credit (managed migration) Transitional Capital Disregard.

Couples and joint claims

Couples who live together and are identified as being eligible for 'Move to Universal Credit (managed migration)' share the same deadline date. However, they are sent their own individual migration notices. Once the migration notices are issued, they are known as a 'notified couple' for the purposes of 'Move to Universal Credit (managed migration)'.

If one member of the couple has their deadline date extended to give them more time to claim, the same extension is also applied to their partner.

To be considered for the Transitional Protection Additional Amount, both members of a notified couple must make a joint claim to Universal Credit within 1 assessment period of their deadline date.

If one or both claimants do not make their claim within 1 assessment period of the deadline date, neither of them will be eligible for the Transitional Protection Additional Amount.

Change in couple status before making a claim

For the detail on what happens if the couple status changes before a claim is made see Change in couple status and ineligible partners.

See 'Couples who do not live together' and 'One member of the couple is in the Armed Forces' for further information on the entitlement specific to these groups of people.

If a claimant was sent a migration notice as a single person and then claims Universal Credit as part of a couple, they are not entitled to the Transitional Protection Additional Amount. However, they are entitled to the Transitional Capital Disregard and student disregard if they meet the other eligibility criteria for these disregards.

Students, claimants in education

Students in advanced education who make a claim for Universal Credit as part of 'Move to Universal Credit (managed migration)' are exempt from the normal Universal Credit education eligibility criteria.

They will be allowed to complete any course they were participating in on the date they made their claim.

If they start a new course of education after the claim has been made, the normal Universal Credit student eligibility rules must be applied. This could lead to the claim being closed. See Students: Eligibility, conditionality and student income.

If the claim is closed and a further claim for Universal Credit is made again at a later date, the normal student eligibility is applied.

The only exception to this is if the claim was closed due to earnings. In these circumstances, if a further Universal Credit claim is made within 4 months of the last day of their previous entitlement, the student disregard can be applied.

Self-employed claimants

Self-employed claimants who claim Universal Credit as part of 'Move to Universal Credit (managed migration)' follow the same self-employment journey as all other Universal Credit claimants.

See: Self-employed and gainfully self-employed.

Claimants with a current Employment and Support Allowance Work Capability Assessment decision

If the claimant has a current Work Capability Assessment (WCA) decision recorded on their ESA claim, this will automatically be carried over to their Universal Credit claim as part of managed migration. They will not need to attend another WCA and Universal Credit WCA review processes will apply.

This applies to any claimant moving to Universal Credit from ESA without a break in their claim and not exclusively to 'Move to Universal Credit (managed migration)' claimants.

Mandatory reconsiderations and appeals

Claimants do not have the right to an appeal or Mandatory Reconsideration of the requirement to claim Universal Credit as part of managed migration.