

# Move to UC Operational Update

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For Discussion

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# Main objective

**This paper is for information and provides:**

- Operational Delivery Update
  - September activity against the profiles
  - Couples discovery
  - Working Age discovery
- Monthly cohort view
- HMRC update
- Resource position and Implementation activity

# Operational delivery update

## Headline Figures for September 2023

- 36,010 Migration Notices issued, against a profile of 46,000.
- 11,601 inbound telephone calls, of which 11,572 answered which equates to 99.75% of all calls answered. Inbound calls increased by 3,411 against August's figure of 8,161

## Cumulative figures Jan to September 2023 (All data to 27/9/23)

- 141,832 Migration Notices sent, of which 82,812 are yet to apply
- 47,012 Customers in receipt of UC following managed migration
- 29,563 Transitional Protection awards made, with an average award value of £199
- 10,436 legacy benefit terminations made with no claim to UC

## Couples Discovery

- 514 Migration Notices sent to Tax Credit couples in May and June 23, of which:
  - 35 couples have yet to apply
  - 222 have claimed or are on UC (43% claim rate)
  - 232 Tax Credit claims have been terminated

We scaled to couples from 27 September across all of the postcodes where Move is currently live

## Working Age Discovery

- 523 Discovery Migration notices were issued on 6<sup>th</sup> September, of which:
  - 83 Claims to UC have been made
  - No Working Age legacy claims have yet been closed or withdrawn,
  - First reminders for this group will begin on 24<sup>th</sup> October
  - Design activity is ongoing to build in an outbound call around the time of the second reminder to establish vulnerability and take safeguarding steps where required

Activity	Aug 23	Sep 23
Total Migration Notices issued	45,150	36,010
Customers yet to apply following MN Issue	36,011	26,743
Customers receiving UC	8,962	2,629
Transitional Protection Awards made	5,078	830

# Monthly cohort view

		April	May	June	July	August	September S	September C	October S	October C
<b>MNs issued in month</b>		<b>5,093</b>	<b>13,066</b>	<b>22,834</b>	<b>27,528</b>	<b>45,156</b>	<b>29,404</b>	<b>5,121</b>	<b>100</b>	<b>2651</b>
<b>End of Week</b>	1	99%	100%	100%	98%	100%	100% (6,676)	100% (5112)	100% (100)	2651 (2651)
	2	96%	96%	98%	96%	99%	97% (12,903)			
	3	94%	94%	97%	95%	96%	95% (18,131)			
	4	91%	93%	96%	93%	95%	93% (24,343)			
	5	89%	92%	94%	91%	93%	91% (26,743)			
	6	85%	91%	91%	90%	93% (41,894)				
<b>Reminder 1</b>	7	82%	89%	89%	88%	89% (39,994)				
	8	80%	88%	88%	86%	86% (38,729)				
	9	78%	86%	84%	82% (22,644)	83% (37,491)				
<b>Reminder 2</b>	10	75%	82%	81%	77% (21,320)	80% (36,011)				
	11	69%	78%	77%	71% (19,691)					
	12	66%	74%	71%	65% (17,866)					
<b>Terminations</b>	13	60%	64%	65%	58% (16,026)					
	14	47%	54%	58% (13,233)						
	15	35%	44%	43% (9,840)						
	16	22%	28%	28% (6,356)						
	17	2%	16%	14% (3,299)						
<b>Extentions</b>	18	1%	5% (623)	6% (1,305)						
	19	1%	2% (233)							
	20	1%	1% (191)							
	21	1%	1% (153)							
	22	1% (35)	1% (138)							
	23	1% (27)								
	24	1% (26)								
	25	0% (24)								
	26	0% (24)								

## Cohort data:

- This view is distorted by significant peaks in activity. A spike in activity in the last few days of the month will show a disproportionate volume of customers outstanding.
- 15% of June Migration Notices were sent in the last 3 working days. This data was update on 27 September - at which point 3823 cases were not matured to the point that a termination was appropriate. Of course, a significant volume of those customers have already made their claim – but a reasonable number will also be reflected in the 1305 outstanding.
- The daily cap will make this view far more consistent and reliable from the October cohort.

# HMRC UC Update – Oct 2023

All Tax Credit Migrations	May 22 – Sept 23
Total Migration Notices issued	155,953
UC Claims Made (and completed)	53,713
TC Claims Terminated	12,035
T/P Calculations Made	37,950
Former TC Claims receiving T/P	33,640
%age of ALL Awards getting T/P	62.6%
Average Monthly TP amount	£198
Residual TC Caseload (UK)	986,917

As previously reported, this section includes all migration activity for the period between May 2022 and the end of September 2023. The volume of migration notices issued continues to ramp-up broadly in line with the profile. Although this fell behind in September, it is pleasing to note the agreement to start the Expansion of 'Couples' claims in October which will be pivotal to meeting the 2023/24 profile and brings a further 250k cases into the selection pot.

As we get further into the Expansion phase the rate/ratio of claims and terminations becomes more meaningful and the trend of around a fifth of those invited to claim UC not doing so remains constant. The early signs from the Discovery of TC Only Couple Claims appears to show a slower and lower response rate resulting in additional numbers being terminated which remains a concern that we will monitor.

## HMRC Update

- The UC migration information leaflet has now been sent to 1.1m eligible TC households with the only exceptions those who are at (or close to) Pension Qualifying Age. While there has been some customer contact into both Depts, and a small number of erroneous UC claims made, there has been a positive engagement with the leaflet and HMRC advisors are handling the contact with enhanced guidance.
- The number of TC cases being terminated remains high however (as discussed last month) we are not seeing anything out of the ordinary in customer behaviour, contact and/or complaints, but will continue to monitor this as we complete the 'Couples' Discovery journey and embark on the Discovery work for combination cases in October.
- Confidence in the delivery of the TC Only cohort remains high, especially now we are expanding Couples, but we recognise the challenge of completing the migration by March 2025. The proposed refresh of the 24/25 delivery plan should mitigate some of the concerns with completing TC, HB, JSA, IS, ESA, DfC and Pension Credit cases in the last 6 months of the migration, but the findings of the Discovery work over the next few months will provide a clearer view of the challenges we face.
- Policy colleagues continue to work with DWP to develop the legislation to facilitate the 'Hybrid' solution to migrate the 30k+ Pension Aged TC customers.

# Resource position and Implementation

## Resourcing

- Move to UC pre-claim activity continues to be delivered from Nottingham, Stockport and Bolton.
- Plans are in place to expand into St Austell from Q3 (Oct-23). From a pool of 151 potential AOs secured through a recent recruitment we will identify the 84 MtUC Agents alongside internal exercises for associated line management.
- Work continues to refine the cost model for Move to UC, to be reflected in Winter Planning.
- Our resourcing plan is aligned to the revised (but not baselined) Q3 Demand, mindful that current claimants are the least complex. Additional activity to support the complexity and vulnerability of the 24/25 cohort will need to be built into future planning to retain the level of service required and ensure safe transition for those customers.
- A paper is being submitted to PDE on 11 October with a proposed revision to the 24/25 profile to provide confidence and assurance around future deliverability as we begin our expansion into Working Age and legacy benefits from April 24.

## Implementation

- Six Districts successfully went live in September - Lincolnshire, Nottinghamshire and Rutland, Essex, DWHI, South West Wales, East Scotland and Cumbria and Lancashire; and two Districts went live in October – Central Scotland and South East Wales.
- The Move to UC Welsh language line went live on 04/09 in line as we expanded into our first Welsh District
- Implementation activity is progressing and on track for South West Scotland District, with a scheduled go live of 6 November
- The SLT start up call for BBO will take place on 10 October, commencing their implementation activity ready for go live on 4 December

To ensure that we have sufficient volumes of customers for Q4 we are exploring options for bringing some Districts forward for rollout and we will work with your Transformation Leads to impact that.