

# Move to UC operational update

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# Main objective

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

- Operational Delivery Update
  - October activity against the profiles
  - Couples' discovery and Scaling
  - Legacy benefits discovery
- Monthly cohort view
- HMRC update
- NI Update
- Resource position and Implementation activity

# Operational delivery update

## Headline Figures for October 2023

- 55,001 Migration Notices issued, against a profile of 55,000 for October (this now includes all discovery cases but excludes NI)
- From the October migration notices, 253 single customers have claimed UC and 1,101 couples have claimed UC.
- 11,035 telephone calls (for October) of which 10,989 answered which equates to 99.59% of all calls answered.

## Cumulative figures to 12 November 2023

- 232,880 Migration Notices sent, of which 130,637 are yet to apply
- 88,064 Customers are receiving UC due to Move
- 63,383 Transitional Protection awards have been made with an average value of £193
- 30,655 Terminations have been made

## Working Age Discovery (included in cumulative figures)

- 1,219 Discovery Migration issued
- 155 Claims to UC have been received
- Reminders for this group began on 24<sup>th</sup> October with 398 issued up to 30 October

## Move to UC Dashboard

The Move to UC dashboard went live on Wednesday 1 November and this is what these figures are now based on.

Cumulative figures include all MNs issued (excluding NI) since May 2022 until filters are released in V2

The dashboard can be accessed [here](#). If you do not have access, this needs to be requested through DWP Place.

# Monthly cohort view

		May	June	July	August	September Single	September Couple	October Single	October Couple
MNs issued in month		13,066	22,834	27,528	45,156	29,405	5,122	4,969	50,794
End of Week	1	100%	100%	98%	100%	100% (6,676)	100% (5112)	100% (100)	2651 (2651)
	2	96%	98%	96%	99%	97% (12,903)	100% (5,107)	100% (648)	100% (15,849)
	3	94%	97%	95%	96%	95% (18,131)	97% (4,954)	98% (1,718)	99% (28,599)
	4	93%	96%	93%	95%	93% (24,343)	N/A	N/A	N/A
	5	92%	94%	91%	93%	91% (26,743)	94% (4830)	95% (4,737)	98% (49,672)
	6	91%	91%	90%	93% (41,894)	91% (26,708)			
Reminder 1	7	89%	89%	88%	89% (39,994)	86% (25,425)			
	8	88%	88%	86%	86% (38,729)	N/A			
	9	86%	84%	82% (22,644)	83% (37,491)	83% (24,290)			
Reminder 2	10	82%	81%	77% (21,320)	80% (36,011)				
	11	78%	77%	71% (19,691)	80% (35,951)				
	12	74%	71%	65% (17,866)	72% (32,295)				
Terminations	13	64%	65%	58% (16,026)	N/A				
	14	54%	58% (13,233)	58% (15,959)	62% (27,786)				
	15	44%	43% (9,840)	29% (7,851)					
	16	28%	28% (6,356)	N/A					
	17	16%	14% (3,299)	9% (2419)					
Extentions	18	5% (623)	6% (1,305)						
	19	2% (233)	6% (1,288)						
	20	1% (191)	1% (222)						
	21	1% (153)	N/A						
	22	1% (138)	1% (143)						
	23	1% (138)							
	24	1% (117)							
	25	N/A							
	26	1% (108)							

\*TC couples scaling took place from 28th September.

\*\*The overall figure for October differs from the official figure quoted on slide 3 due to a variation in the way the data is collected.

# Discovery and scaling

## Scaling - Couples

- The decision was taken at PDE to continue to scale with Tax Credit Couples from October.
- Up to 30 October we sent 49,695 migration notices to couples with 1,101 now claiming UC
- From discovery only 9 couples have yet to apply, 222 have claimed UC as of 30 October. Terminations have started with this group – 218 Tax Credit claims have been terminated (up to 30 October)
- We will continue to gather insight from Couples Discovery and live running to understand how we can support this cohort to make their UC claim.
- We are seeing a lower claim rate (45%) among couples than in Singles, we continue to track this.

## Introduction of the daily cap

- Embedding the daily cap from October was critical to get a model that can scale effectively.
- The daily cap has embedded well for October and given us the steady flow of migration notices we needed. A new daily cap has been set for November at 3600 per day to enable us to overachieve by around 5% to catch up with the deficit against overall profile.

## Discovery – Legacy

- Legacy discovery commenced on 6th September with 500 Migration Notices sent in Greater Manchester Local Authority; and a further 696 migration notices have been sent in October so far. Of those only 23 were couples and 1 couple has claimed so far.
- There are some issues extracting couples claims for discovery work, we want to ensure we undertake discovery with a good number of couples cases and therefore further discovery is paused until we are able to fix the issue.
- 155 claims made to UC so far from discovery.
- We are about to make our first outbound calls following the 2nd reminders to this first discovery group and this will inform the support journey design.
- Customers have been invited from all Legacy Benefit combinations. We are keen to learn how we can enhance engagement with JSA customers through the fortnightly intervention and will work with the local district on a journey that provides that evidence base.
- We are receiving some rich insight from our jobcentres and work coaches.
- Work ongoing to use discovery learning to inform the operational delivery model from April 24

# HMRC UC Update – Oct 2023

Tax Credit Migrations (UK Wide)	Apr 23 – Oct 23
Total Migration Notices issued	208,752
UC Claims Made	83,786
TC Claims Terminated	18,774
Natural Migrations Made	53,138
%age of Awards getting T/P	74.3%
Average Monthly TP amount	£195
Residual TC Caseload (UK)	943,249

This section now reflects the Expansion period rather than the entire migration, so these figures cover all migration activity for the period between April 2023 and the end of October 2023. The volume of migration notices issued continues to ramp-up and remains in line with the profile. The inclusion of Couples from October and the implementation of daily and monthly caps should ensure we remain in target for the rest of 2023/24.

The residual tax credits caseload continues to drop in line with the forecast and is on target to reach 600k by the end of 23/24. While the early signs from the expansion of the TC Only Couple Claims appears to show a slower and lower response rate (with a high proportion of terminations) it will not impact the overall caseload reduction profile.

## HMRC Update

- Any noise from the issue of the UC migration information leaflet has now subsided. One interesting item to note is that the rate of 'Natural Migrations' has increased over the last two months (since the leaflet was issued). Between April and August the monthly average was 6.5k, but both September and October saw over 9.5k customers moving this way. Hopefully this is as a result of reviewing the calculators and assessing that they would be better off on UC rather than misinterpreting the leaflet and making an erroneously claim – we will monitor.
- The number of TC cases being terminated remains high (and if anything is increasing), however we are not seeing anything out of the ordinary in customer behaviour, contact and/or complaints. We complete a monthly 'Deep Dive' of all UC related complaints and will continue to monitor this as we start to terminate 'Couples' cases and complete the Discovery journey for combination cases.
- Confidence in the delivery of the TC Only cohort remains high, and the 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.
- It was pleasing to see the 'Hybrid' option retained as the solution for migrating Pension-Aged customers as this will make the operational delivery of this cohort simpler and aligned with our BAU processes. Policy colleagues continue to work with DWP to develop the legislation to facilitate the solution to migrate the 30k+ Pension-Aged TC customers by the end of 2024.

# Discovery in Northern Ireland

- Discovery now completed in NI for Tax Credit only customers and key findings have been shared with key stakeholders
- Key findings from Discovery were
  - Out of 502 Migration notices issued, 386 claims (77%) in total were made – 202 claims made in Andersonstown (urban) and 184 claims made in Enniskillen (rural)
  - 377 claims were made within 3 months; 8 claims were made in the grace period; 1 claim was made in the extension grace period
  - 8 people were granted an extension – 4 claims have been made, 2 have not claimed and 2 were still within their extension period
  - 87% of claims were entitled to TP with the average amount of TP being £162.62
  - 4.4% of claims made a telephone claim with the higher percentage of these in our rural area
  - 23% of people telephoned the Delivery team at least once with 5% calling more than once. The common themes for contact included advice on how to claim, financial support available during the 5 week wait, a lack of digital skills and information on how UC is calculated

# Discovery in Northern Ireland

- Some of the people we were able to contact by telephone gave limited information about why they did not claim including no longer claimed tax credit, children that had left education, increase in their work hours, had got married and had no interest in claiming.
- Key feedback from both customers and stakeholders was a lack of awareness regarding the 5 week wait. As a result, we have included information about the 5 week wait in the Migration Notice and strengthened our messages on NI Direct
- Text reminder at week 3 was shown to add the most value to the customer journey out of all the additional touch points and included for scaling.
- The outbound calls tested at week 11 and week 15 had limited success with on average only 25% of people being contacted with 90% of the calls being unsuccessful
- At the point when the analysis was completed, 354 claims had passed their first AP. Out of those claims, 19% were receiving help with housing costs, 9% were self employed, 2% had capital over £16k, 3% had withdrawn their claim and 1% had their claim closed.



# Communication approach for Expansion

- Advertising campaign launched on 9 October through social media, press, TV
- News coverage to coincide with the commencement of scaling on Newsline and Radio Ulster.
- Radio Ulster consumer programme “On your behalf” covered the Move to UC on Saturday 14<sup>th</sup> October allowing the opportunity to cover all the key messages regarding Move and was an opportunity to answer some of the queries raised. Further slots are planned to raise awareness of the various supports available i.e. labour market, financial support etc.
- There has been extensive engagement with Stakeholders prior to go-live including All stakeholder calls and more detailed events with local stakeholders
- Written communications issued to MLAs, Press and staff throughout w/c 25 September as well as supporting intranet articles to raise awareness
- Proactive approach taken due to issues raised by stakeholders about the HMRC leaflet – lines to take issued to all operational staff and supporting social media messages issued
- Updated customer information went live on NI Direct content

# Update on Expansion of Move to UC in NI

- Expansion of Move to UC for Tax credit only claimants commenced on 16 October 2023 and people in every postcode across Northern Ireland have started to receive Migrations Notices.
- To date the total number of Migration Notices issued are 4164 against an ambition of 4200 (October total 2058; November total 2106)
- It has been confirmed that there is an even spread of Migration Notices across all postcodes
- Up to 13 November, 200 claims have been made with claims evenly spread across all service centres and front offices

# Forward Look

- UC Programme had liaised with DWP about feasibility of a Discovery Exercise for remaining Legacy customers.
- Initial impacting was completed and provisional agreement to progress was in place
- Following discussion with impacted stakeholders in DfC, risks were highlighted regarding the challenging timelines associated with commencing a Discovery in time to learn and impact ahead of expansion for these customers
- Other risks linked to mixed messages for people claiming, complications in Operational Delivery model for Discovery and the potential financial impact of uprating.
- The Programme is currently exploring alternative options relating to customer insight that will supplement the learning from the DWP Discovery

# Resource position and Implementation

## Resourcing

- Move to UC pre-claim activity continues to be delivered from Bolton, Nottingham, Stockport, and our newest team in St Austell. Via joint recruitment with the service centre we expect 84 MtUC Agents to be onboarded in St Austell during Q3, along with associated line management.
- Resourcing plans are aligned to meeting the current forecast level of Q4 Demand; options to increase supply to meet this are currently being finalised by end November.
- PDE, on 11 October, agreed to the continued expansion of MtUC activity; a revised profile covering the expansion from Tax Credits into Working Age and Legacy Benefits from 2024/25 has also been agreed.
- Additional activity to support the complexity and vulnerability of Working Age cohorts will be reflected in a revised Cost Model, to retain the level of service required and ensure safe transition for these customers beginning in Q1 of 2024/25. Work to design the journey for those with complexity and vulnerability continues through discovery.
- Work to refine the Move to UC Cost Model, for Winter Planning refresh, is progressing well; we expect to take through formal governance routes in Dec/Jan.

## Implementation

- In October Southwest Scotland went live along with Wrexham SC. Wrexham SC implementation was brought forward and the implementation timeline condensed successfully.
- Implementation activity is progressing and on track for BBO District, with a scheduled go live of 4 December.
- The SLT start up call for Devon & Cornwall (remaining sites), Leicestershire & Northamptonshire, and Northumberland, Tyne and Wear is scheduled for 17 November, commencing their implementation activity ready for go live on 8 January 2024
- To ensure sufficient volumes of customers are available for Q4, 10 district will be going live in February, with Black Country, the final remaining district, going live in March.