

To UC Programme Board Members **From:** Will Garner
Sponsor: Ian Wright
Date: 21/11/2023

Paper Title: Move to UC progress

Issue: *The programme board have requested a monthly update on progress of the Move to UC Discovery work.*

Recommendations/Decisions required:

- **For Information**

Timing: *Routine*

Introduction

1. Moving Tax Credit claimants at scale continues to deliver in line with our intended profile. The product and design teams are continuing to support that scaling whilst also turning our attention to expansion through Discovery around couples claims and subsequently other benefit combinations beyond the Tax Credits only cohort.

Progress since the last board

Moving Tax Credits claimants at scale

2. Automation of the whole process of identifying claimants in scope and sending them a Migration Notice has enabled us to continue in line with the profile. A daily cap of Migration Notices continues to smooth the profile in line with our plan. Over 54,000 notices were sent in October.
3. Tax Credits couples claims are now also being notified to move and we continue to see a slightly lower claim rate among the couples cohorts. Over 80,000 couples have been notified to move since we started scaling this cohort.
4. Improvements continue to be made to the Transitional Protection calculation to reduce manual input and therefore error. ~93% of the TP calculation is now automated from a Move to UC agent's perspective.

Moving claimants with other benefit combinations

5. Discovery tests with other benefit combinations (not Tax Credits only) began on 6 September as planned with 1228 Migration Notices sent to date. So far 348 claims have been made.

6. Owing to some data quality issues between legacy data systems and our Customer Information System we were unable to send Migration Notices to couples in the first Discovery cohorts. Couples will be added to the Discovery in week beginning 20 November 2023.

Next steps

7. The first claimants in Discovery for other benefit combinations will shortly be reaching their deadline dates and we will be testing the no-claim process including outbound contact where relevant. We will bring consolidated learnings from Discovery to a future Programme Board.
8. The Discovery findings will inform our approach to scaling including informing the level of manual effort versus automation that can be achieved in the scaled process for these benefit combinations.
9. We will continue to monitor claim rates and the claimant experience including further research into the Migration Notice for couples and the reasons for not claiming amongst those who don't respond.
10. We will iteratively remove categories of claimant who are deferred from the Move to UC process. These include those requesting contact in alternative formats from their legacy benefit provider, mixed age couples and claimants with appointees.

Decision / Recommendation

11. Programme Board are asked to note the progress of the Move to UC work, support for scaling to the current profile and the importance of discovery work to enable expansion in 2024/25.