

# Move to UC Transitional Protection Payment Accuracy

**Sponsor: Helga Swidenbank**

**Author:** [REDACTED] & [REDACTED]

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# Context



This paper responds to a request from Programme Board to review and report on the accuracy of Transitional Protection payments.

The report relates to 489 Tax Credit only claims checked between October 23 and January 24. Claims become available for a quality check 7 days after the 1<sup>st</sup> AP payment has been calculated. Customer Experience Directorate perform the end-to-end check, which includes the 'Calculate Transitional Protection' To Do.

In direct response to this ask, a Tier 2 Quality interim report has been produced. This report is not yet published and contains raw data not yet cleansed through the usual process.

**This paper sets out the detailed finding of these check, but the headline is that we have a 99.2% accuracy rate for the calculation of Transitional Protection.**

Transitional Protection payment calculations are automated. This report focuses on the manual agent activity of completing the required fields within the calculator, that are not already auto-populated with information from HMRC. Through the National Quality Reporting Team and our local quality assurance activity we assess process competence and compliance.

Full automation of the calculation is planned but we currently have no firm date for this to be implemented.

In terms of automation - the Move calculation is acting as we expect, and the information received from HMRC is correct and in line with data agreements.

# Findings



**In summary** – relating only to the accuracy of the Transitional Protection activity, the report finds that – of the 489 cases checked:

- 17 potential system errors were found and attributed to System and Policy Instruction. In these cases, tickets have been raised and are sitting in the relevant teams to be prioritised.
- 35 claims had been assessed and paid for AP1, but the Transitional Protection To-Do had not been actioned. Agent behaviour, customer behaviour and jobcentre capacity could all contribute to this delay. All cases will be rectified once the To-Do is completed.
- 8 further cases had errors in other elements of the payment that have an impact on Transitional Protection. It is possible for claims to have errors in multiple elements – these are 8 errors, not necessarily 8 additional claims.
  - 3 cases did not have the 'Verify people who live with you' To-Do completed, causing the Transitional Payment To-Do not to generate
  - 4 cases showed an agent error in the input benefit or other award.
  - 1 case showed the 'Recalculate Transitional Protection' option had not been selected correctly.

All cases have been corrected where an agent error is identified and the Line Manager is aware to consider training needs.

It's worth noting that:

- If tax credit award becomes nil between MN issue and UC claim date no file is received and an incident ticket raised to remove the calculate TP To Do
- If a change of circumstances is outstanding in HMRC when the UC claim is made that would change the Tax credit award. When the tax credit award is recalculated, the data is sent through to DWP with the new entitlement to recalculate TP.
- If a claimant reports a change in circumstance to Tax credit after or as part of their UC claim. Tax credit will amend the award but this does not trigger a new TE file for UC.

## Conclusions and Next Steps



Of 489 claims checked there were no cases of agent error in the Transitional Payment calculation to-do.

**4 cases (<1%) showed an error/failure to complete a related to-do that will have impacted on the accuracy of Transitional Protection.**

**This 99.2% accuracy rate should give us confidence in our ability to correctly calculate and pay Transitional Protection to Tax Credit customers.**

All other 'errors' relate to delays in action being taken which is reflected in the payment in full measure. These cases are kept in view until that action is taken. The evidence is that this action is taken correctly once completed.

All incidents have now been resolved. Cases where the TP calculation to-do has not generated are monitored and corrected on an individual basis. The numbers of these incidents are tracked and where the numbers are significant, a fix of the root cause is considered for prioritisation alongside the work needed for April scaling.

The interim report will be published and shared with Service Centres through the Leading and Managing Great Service network.

Whilst the majority of this activity sits in the post claim space the Move to UC leadership team will support these conversations with Service Centre leaders and will focus Tier 1 Quality Assurance activity in key areas to drive up capability provide ongoing assurance.