

# Help to Claim: Guidance

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## Introduction

Help to Claim provides tailored support to make a new claim to Universal Credit for those that need it.

Help to Claim support is funded by DWP and delivered by Citizens Advice in partnership with Citizens Advice Scotland using telephone, webchat and online advice content.

Contact details for the Citizens Advice Help to Claim service are available in the Related Content links on this page and also on the National District Provision Tool pages.

Jobcentres will provide face to face support to make a new claim to Universal Credit for people who are unable to use the telephone, webchat and online advice content.

## Who is eligible for support through Help to Claim?

There are no set eligibility criteria for Help to Claim, instead it is focused on the help and support that people need.

Anyone who needs support to make a new claim to Universal Credit or is moving from a Legacy benefit to Universal Credit following a change of circumstances, can use Help to Claim.

Help to Claim also offers support to claimants who are in their first assessment period to progress their claim until the first full correct payment of Universal Credit is made.

Using Help to Claim is voluntary. The support is available at any time until the first full correct payment of Universal Credit is made.

## **Considering if Help to Claim is appropriate for the claimant**

Before offering the webchat and online Help to Claim support provided by Citizens Advice and Citizens Advice Scotland, consider if:

- the claimant:
  - can self-serve or claim online with help from a friend, family member or third party
  - needs face-to-face support, if they do, they can go to their local jobcentre where staff will identify the right support for their needs
  - needs urgent support which can be provided in-house
- the claim by phone process is appropriate - this must only be used when other assisted digital options have been exhausted and all reasonable attempts have been made to enable, support and educate claimants to self-serve online, or if the claimant insists (for more information, see the Related Content)
- a home visit is needed, this must only be considered in exceptional circumstances

## **How the Help to Claim service works**

### **Accessing Help to Claim support by telephone, webchat and online advice content**

Help to Claim allows claimants to access the support they need in the way that's right for them. Claimants accessing Help to Claim can:

- self-refer by contacting Citizens Advice or Citizens Advice Scotland directly
- be signposted by a third-party organisation
- be signposted by DWP if a new Universal Credit claim has not yet been submitted
- be referred by DWP if a new Universal Credit claim has already been submitted

### **Help to Claim check**

Citizens Advice or Citizens Advice Scotland will check that Universal Credit is the right benefit for the claimant.

### **Individual needs assessment**

Citizens Advice (CA) or Citizens Advice Scotland (CAS) assess a claimant's individual needs to make sure they are given the right level of support in the way that's right for them.

Those who can help themselves are encouraged and helped to do so, and more intense support is given to those that need it most. Those who need face-to-face support will be signposted to their nearest jobcentre for support.

If CA or CAS signpost a claimant to their local jobcentre for face-to-face Help to Claim support, the jobcentre can assume the need for face-to-face support has already been identified. In these cases, the claimant will be seen face-to-face in the jobcentre and not signposted or referred back to CA or CAS.

### **Support to start a Universal Credit claim**

Depending on how much support a claimant needs to make a claim, they may be helped to:

- access and use a computer and printer
- create an email address or a Universal Credit account
- get a bank account
- work through claim to-dos, understand the journal and how it is used
- access Universal Credit claim by phone service
- access DWP home visit support

### **Completing a claim and getting ready for the first payment**

Depending on how much support a claimant needs to complete their claim and be ready for the first payment to be made, they may be helped with:

- verifying their identity
- obtaining and providing additional evidence
- preparing for the practicalities of their first monthly payment and how to budget
- requesting adaptations such as Alternative Payment Arrangements or Scottish Choices and conditionality easements
- understanding their Claimant Commitments
- applying for an Advance payment and given advice on additional financial support

### **Access to longer term support**

Additional support, beyond the scope of Help to Claim, can be offered by Citizens Advice or other organisations, for example financial support (including Discretionary Housing Payments) and money guidance.

### **Accessing face-to-face Help to Claim support**

Jobcentres will provide face-to-face support to make a new claim to Universal Credit for people who are unable to use the telephone, webchat and online advice content. The support will include:

- setting up an email address

- working through claimant to-dos
- accessing the Universal Credit phone service
- verifying identity
- help with providing additional evidence
- access to direct payments to landlords
- applying for Advances
- conditionality easements
- long-term support and signposting out to other organisations via the District Provision Tool

## **What Citizens Advice and Citizens Advice Scotland cannot do**

It's important to note there are some things Citizens Advice or Citizens Advice Scotland cannot do as part of Help to Claim. They:

- cannot:
  - provide face-to-face support to make a new Universal Credit claim, this must be done by the jobcentre
  - make a claim for their clients, but they can support their clients to submit their digital claim
  - take the claimant details and create their claim for them
  - complete the ID verification process. They can only help clients prepare for this and support them to use the service.
  - delete a partner linking code if the client is struggling to set up a joint claim
  - help with a medical assessment or UC50 form
  - help with making a mandatory reconsideration after their first full payment
- do not have access to claimant accounts or journals and are not able to make changes on their behalf

## **Supporting claimants to access Help to Claim**

Before a claim has been submitted, claimants can be signposted to Help to Claim. Contact details for the Citizens Advice Help to Claim service in England and Wales, and the Citizens Advice Scotland Help to Claim service are available in the Related Content links on this page, and also on the National District Provision Tool pages.

If a claim has already been submitted, you can refer claimants to Help to Claim.

When a referral is made, record the intervention on the claimant's journal and let the claimant know that Citizens Advice or Citizens Advice Scotland will attempt to contact them a maximum of 3 times within 3 working days through their preferred contact method. If there is no response, no further contact is attempted.

The online referral tool must only be used for Help to Claim referrals. Any other general referrals to Citizens Advice / Citizens Advice Scotland for support (other than Help to Claim) such as budgeting advice are made using the agreed local referral process.

For the signposting process, see the National DPT Help to Claim page.  
For the referral process see the Help to Claim page on your local District Provision Tool.

## **Prison leavers**

Prison work coaches will continue to book Initial Evidence Interviews (IEI) at jobcentres for when the claimant is released.

If a prison leaver is identified as requiring help to make and submit their claim online, prison work coaches will continue to arrange for them to attend the jobcentre 1 hour prior to their IEI where jobcentre staff will support them to make and submit their claim online.

If a prison leaver is identified as requiring additional support, refer them to Help to Claim after the IEI using the referral process.

## **Cyber security**

Claimants concerned about online security can be signposted to the National Cyber Security Centre (link is external)

## **Useful links**

- [Help to Claim: Frequently Asked Questions](#)
- [National District Provision Tool Help to Claim](#)
- [Index of District Provision Tools](#)

## **Related Content:**

### **Guidance:**

[Help to Claim - Citizens Advice and Citizens Advice Scotland online referral guide](#)

### **Spotlights:**

[Spotlight on: Claims by phone](#)

## **Elsewhere on the web**

[Citizens Advice Help to Claim](#)

[Citizens Advice Scotland Help to Claim](#)