

# **Move to Universal Credit (managed migration): Guidance**

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## **Introduction**

Universal Credit is replacing the following legacy benefits:

- Child Tax Credit
- Working Tax Credit
- Housing Benefit
- Income Support
- income-based Jobseeker's Allowance (JSA)
- income-related Employment and Support Allowance (ESA)

Many claimants will claim Universal Credit naturally when they have a change in circumstances which would have previously resulted in them needing to make a new claim to a legacy benefit. However, it is now not possible to make a new claim for:

- income-based Jobseeker's Allowance
- income-related Employment and Support Allowance
- Housing Benefit
- Income Support
- tax credits

Any change of circumstances resulting in a new claim would mean that the claimant must claim Universal Credit. At which point, their claim to any existing legacy benefits would end.

The circumstances which mean that a claimant must make a new claim, will remain the same, for example a change:

- of employment status

- in health or family circumstances
- of local authority (if they claim Housing Benefit)

This list is not exhaustive.

If a claimant has not claimed Universal Credit already due to a change of circumstances, they are now being directed to do so as part of Move to Universal Credit (managed migration).

## **Managed migration process**

Claimants selected for managed migration are informed that they must claim Universal Credit to maintain their benefit entitlement.

## **Migration Notice**

They will receive a migration notice letter in the post which explains that their Legacy benefits or tax credits are ending and how to make a claim to Universal Credit by a specific date.

This deadline date is 3 months and 1 day from the date the migration notice is sent (for example, if the migration notice is issued on 25 May, the deadline date is 26 August).

## **Reminders**

Claimants are also issued reminder notices by letter and text to ensure that they make a claim by their deadline and understand all the support which is available to them.

## **Claim made**

Once their claim to Universal Credit has been made, their migrating legacy benefits will be stopped.

Any tax credit payments will stop straight away.

If a claimant makes a claim by the claim-by date, the following benefits will continue to be paid for a further 2 weeks before stopping:

- Income Support
- income-based Jobseeker's Allowance
- income-based Employment and Support Allowance
- Housing Benefit

These payments will not be deducted from the claimant's Universal Credit.

Claimants in temporary or specified accommodation will continue to receive Housing Benefit.

Claimants who make a claim by their deadline or within 1 month of their deadline date passing will be eligible to be considered for Transitional Protection. See No claim made by deadline below.

## **No claim made by deadline**

The claimant's entitlement to their migrating legacy benefits will end from the deadline on their migration notice.

Any tax credit payments will stop straight away.

The following benefits will continue to be paid for a further 2 weeks before stopping:

- income-based Jobseeker's Allowance
- income-related Employment and Support Allowance
- Housing Benefit
- Income Support

If the claimant makes a Universal Credit claim within one assessment period of their claim-by date passing, their Universal Credit claim date will be backdated to the claim-by date. These claimants can still be eligible for Transitional Protection, if applicable.

See [Move to Universal Credit \(managed migration\): Transitional Protection: Eligibility](#) for further detail and what entitlement to Transitional Protection means you are eligible to be considered for.

Claimants over State Pension age who fail to claim Universal Credit within 1 month of their migration deadline passing can still claim Pension Credit.

## **Rollout of Move to Universal Credit (managed migration)**

Move to Universal Credit (managed migration) is now underway across all Jobcentre districts within Great Britain. The remaining groups of households receiving legacy benefits will be migrated to Universal Credit, excluding income-related Employment and Support Allowance only and Employment and Support Allowance with Housing Benefit.

## **Rollout schedule**

The table below shows the different types of claimants and the date they will start to be rolled out.

Income Support claimants	Starting in April 2024
Tax Credit claimants who are also claiming Housing Benefit	Starting in April 2024
Claimants in receipt of Housing Benefit only	Starting in June 2024

Employment and Support Allowance (income-related) claimants who are also receiving Child Tax Credit	Starting in July 2024
Jobseeker's Allowance (income-based) claimants	Starting in September 2024
Claimants over State Pension age claiming Working Tax Credit or Working Tax Credit and Child Tax Credit	Starting in September 2024

Households could be in receipt of a combination of benefits. For example, a claimant may be in receipt of Income Support and tax credits, and they would be sent a Migration Notice along with all other Income Support claimants.

From September 2024, those claiming tax credits who are over State Pension age will also be contacted. These households will be asked to apply for either Universal Credit or Pension Credit, depending on their circumstances.

### **When legacy benefit payments stop**

Claimants who have been mandated to claim as part of Move to Universal Credit (managed migration) will continue to be paid the following benefits either for a further 2 weeks after they have made their claim, or when their deadline date passes:

- Income Support
- income-based Jobseeker's Allowance
- income-related Employment and Support Allowance
- Housing Benefit

For those who make a claim for Universal Credit, the 2-week period will start from the day before the claim was made and will not be deducted from any future payments.

For those who do not make a claim by their deadline date, the 2-week period will start from the day before the deadline date.

Working Tax Credit and Child Tax Credit eligibility will stop from the day before the claimant's deadline date (where no claim has been made) or the day before a claim was made.

### **Pension Age Housing Benefit**

Some claimants over State Pension age will have been entitled to Pension Age Housing Benefit (PAHB) before migrating. This will stop, in the same way as all other legacy benefits when they claim Universal Credit.

However, if claimants over State Pension age do not claim Universal Credit, they can contact their Local Authority and may have PAHB reinstated.

This only applies to claimants over State Pension age who meet specific criteria, not to all Housing Benefit claimants. No other benefits they were in receipt of can be reinstated, only PAHB.

If they claim Universal Credit and need support with housing costs, these will be covered by their Universal Credit claim, not Housing Benefit.

If the Universal Credit claim for a claimant over State Pension age is closed and they start claiming Pension Credit, they may be eligible to claim PAHB.

## **Transitional Protection**

For more information, see Move to Universal Credit (managed migration) Transitional Protection Additional Amount: eligibility and Transitional Protection additional amount calculation.

## **Transitional Capital Disregard**

Any Move to Universal Credit (managed migration) claimants who were entitled to tax credits and had capital over £16,000 the day before claiming Universal Credit will have any capital disregarded for 12 eligible assessment periods. This allows them to claim Universal Credit for up to 12 assessment periods.

For the full eligibility details and more, see Move to Universal Credit (managed migration) transitional capital disregard and Treatment of capital.

## **Couples and joint claims**

Couples who live together and are identified as being eligible for Move to Universal Credit (managed migration) share the same deadline date. However, they are sent their own individual migration notices. Once the migration notices are issued, they are known as a 'notified couple' for the purposes of Move to Universal Credit (managed migration).

If one member of the couple has their deadline date extended to give them more time to claim, the same extension is also applied to their partner.

To be considered for the Transitional Protection Additional Amount, both members of a notified couple must make a joint claim to Universal Credit within 1 assessment period of their deadline date.

If one or both claimants do not make their claim within 1 assessment period of the deadline date, neither of them will be eligible for the Transitional Protection Additional Amount.

See State Pension age claimants: Mixed age couples in a Universal Claim and the State Pension Age claimants: Move to Universal Credit (managed migration) guidance for further information.

## **Change in couple status before making a claim**

For the detail on what happens if the couple status changes before a claim is made see: [Change in couple status and ineligible partners](#).

See: [Couples who do not live together](#) and [One member of the couple is in the Armed Forces](#) for further information on the entitlement specific to these groups of people.

If a claimant was sent a migration notice as a single person and then claims Universal Credit as part of a couple, they are not entitled to the Transitional Protection Additional Amount. However, they are entitled to the Transitional Capital Disregard and student disregard if they meet the other eligibility criteria for these disregards.

## **Students, claimants in education**

Students in advanced education who make a claim for Universal Credit as part of 'Move to Universal Credit (managed migration)' are exempt from the normal Universal Credit education eligibility criteria.

They will be allowed to complete any course they were participating in on the date they made their claim.

If they start a new course of education after the claim has been made, the normal Universal Credit student eligibility rules must be applied. This could lead to the claim being closed. See [Students: Eligibility, conditionality and student income](#).

If the claim is closed and a further claim for Universal Credit is made again later the normal student eligibility is applied.

The only exception to this is if the claim was closed due to earnings. In these circumstances, if a further Universal Credit claim is made within 4 months of the last day of their previous entitlement, the student disregard can be applied.

## **Self-employed claimants**

Self-employed claimants who claim Universal Credit as part of 'Move to Universal Credit (managed migration)' follow the same self-employment journey as all other Universal Credit claimants. See: [Self-employed and gainfully self-employed](#).

For the exception to this rule see [State Pension Age claimants: Self-employment and gainful self-employment](#).

## **Claimants with a current Employment and Support Allowance Work Capability Assessment decision**

If the claimant has a current Work Capability Assessment (WCA) decision recorded on their ESA claim, this will automatically be carried over to their Universal Credit

claim as part of managed migration. They will not need to attend another WCA and Universal Credit WCA review processes will apply.

This applies to any claimant moving to Universal Credit from ESA without a break in their claim and not exclusively to 'Move to Universal Credit (managed migration)' claimants.

## **State Pension Age claimants**

Working Tax Credit claimants who are over State Pension age or part of a mixed age couple are required to claim Universal Credit when they receive their migration notice. This includes claimants who have a nil award of Working Tax Credit but are still entitled to it.

They can choose to claim Pension Credit, but they will have no entitlement to Transitional Protection.

Single Child Tax Credit claimants who have no entitlement to Working Tax Credit are required to claim Pension Credit. They are not entitled to Universal Credit.

Move to Universal Credit claimants are exempt from the Upper Age Limit providing they were entitled to Working Tax Credit and they claimed Universal Credit within 1 month of the deadline on their migration notice.

This is part of the Move to Universal Credit Transitional Protection offer and includes the following claimants:

- single claimants over State Pension age
- couples where both claimants are over State Pension age

Mixed age couples who were in receipt of Working Tax Credit will also be included in Move to Universal Credit (managed migration) but they are not exempt from the Upper Age Limit.

There are specific differences to the normal Universal Credit rules that apply to State Pension Age claimants and claimants in mixed age couples. These include:

- work-related requirements and labour market regimes
- self-employment and gainful self-employment
- the Benefit Cap
- treatment of unclaimed pensions and unearned income

See State Pension Age claimants for details.

For most Move to Universal Credit claimants over State Pension age, where they lose entitlement to transitional protection, their Universal Credit entitlement will also end. For information on when these claimants lose entitlement and any exceptions, see: State Pension Age claimants.

### **Exception to notional income rule**

Move to Universal Credit claimants who are over State Pension age and have an unclaimed private or State Pension will not have this taken into account as notional income for 12 eligible assessment periods. For the full details of this exception see the Exception to notional income rule section of the Unearned Income Guidance.

### **Mandatory reconsiderations and appeals**

Claimants do not have the right to an appeal or mandatory reconsideration of the requirement to claim Universal Credit as part of managed migration.