**HELP TO CLAIM: HOW TO GUIDE**

**Has the possibility of applying for UC come up in an assessment or appointment? If so, consider the following:**

* Is the client eligible for UC?
* Is the client suitable for UC? (i.e. would they be better off remaining on legacy benefits or by claiming contributory benefits?)
* Does the client need generalist or specialist benefits advice before proceeding?
* What is the client's capability to make a UC claim?
* Assisted information or help to claim appointment?
* Is a digital claim going to be too difficult for client, even with our help?

If so, contact UC helpline (0800 328 5644) to request phone or home claim.

**Providing assisted information about claiming UC**

* Public Site UC pages, including checklist of required information
* Assisted Digital Support booklets (individual or couple version)
* gov.uk UC pages
* understandinguniversalcredit.org.uk (including the How to Claim videos)
* Help to Claim webchat service: available on Public Site UC postcode check page
* Help to Claim phone service: 0800 144 8 444, Monday to Friday 8am to 6pm

**Arranging a Help to Claim appointment**

* Find out whether the client already has an email account; if so, ask them to come prepared to log in at the appointment, on their phone if they can
* Find out whether the client has a bank account; if not, provide assisted information   
  (see Public Site pages on this) or arrange practical support to open one
* Talk to ASS about seeing the client as soon as possible
* Ask client to gather checklist information
* Ask client to bring identity documents (e.g. passport, driving licence, council tax bill)
* Ask client to bring information on health conditions and disabilities

**In the Help to Claim appointment**

* Open an email account for the client if required (see guidance in Assisted Digital Support booklet or Which website, linked from Public Site page on how to apply for UC)
* Open UC account on gov.uk
* Input information for each item of To Do list and submit claim
* Verifying client’s identity: according to office resources, either select   
  “I can’t do this online” or use gov.uk Verify service
* Assist client with booking their first appointment at JCP and what to take   
  (see checklist on Public Site page on preparing for UC interview)
* Consider whether any additional support to first payment is urgently needed today   
  (e.g. request for advance payment, food voucher) or book further appointment for this
* Before the client leaves:
  + Log out of client email account if open on our screen
  + Log out of client UC account
  + Ask them to complete Client Satisfaction Survey
  + Ask them how they came to Citizens Advice for help with UC claim if not already known (e.g. council referral, signpost from another charity etc); we can then fill in the Custom Question about this when writing up

**Where a client has claimed UC, do they need help preparing for the JCP interview or additional financial support?**

**If so, provide assisted information or full advice in relation to:**

* How the UC system works, including the payment schedule
* Agreeing the claimant commitment
* Reasonable adjustments the client may need
* Whether a client’s housing element may not cover all of their rent (either because of under-occupancy in social housing or the local housing allowance in private rentals)
* Applying for a discretionary housing payment if eligible
* Applying for council tax support
* Requesting an advance payment of UC
* Requesting alternative payment arrangements for UC (either increased frequency, or direct payment of rent to landlord)
* Local welfare assistance: Herts Help, Sarin, food vouchers etc
* Money advice

**Case recording**

* General: make sure the Casenote covers:
  + client’s eligibility and potential suitability for UC
  + client’s capability, both digitally and generally
* Couples: for a couple’s UC claim, add both individuals to Casebook as separate clients
* Don’t record client login details (e.g. for email account, universal credit account)
* Duration: record the time spent with the client
* Work level:“Casework” will apply where an adviser has taken action directly on behalf of the client, such as contacting DWP with the client to request an advance payment or directly contacting a client’s work coach to request payment flexibility
* Funder: Universal Support (and variants for Webchat and Telephone services)
* Custom questions: complete these once the Universal Support funder is selected
* AICs: use as many as are relevant from the following categories:
  + Benefits Universal Credit / Universal Support
  + Benefits Universal Credit / Initial Claim (we must select third tier code in this category if we have helped with submitting a claim)
* Client satisfaction survey: add the tag “National - Survey - client experience” to a Casenote so that the answers to the survey can be entered
* Outcomes: record as appropriate

**Useful resources**

* Assisted Digital Support booklets
* Casebook Recording Guidance
* Client satisfaction survey “How did we do?”
* Information on setting up an email
* Electronic versions available at Vault / Advice Services / Help to Claim