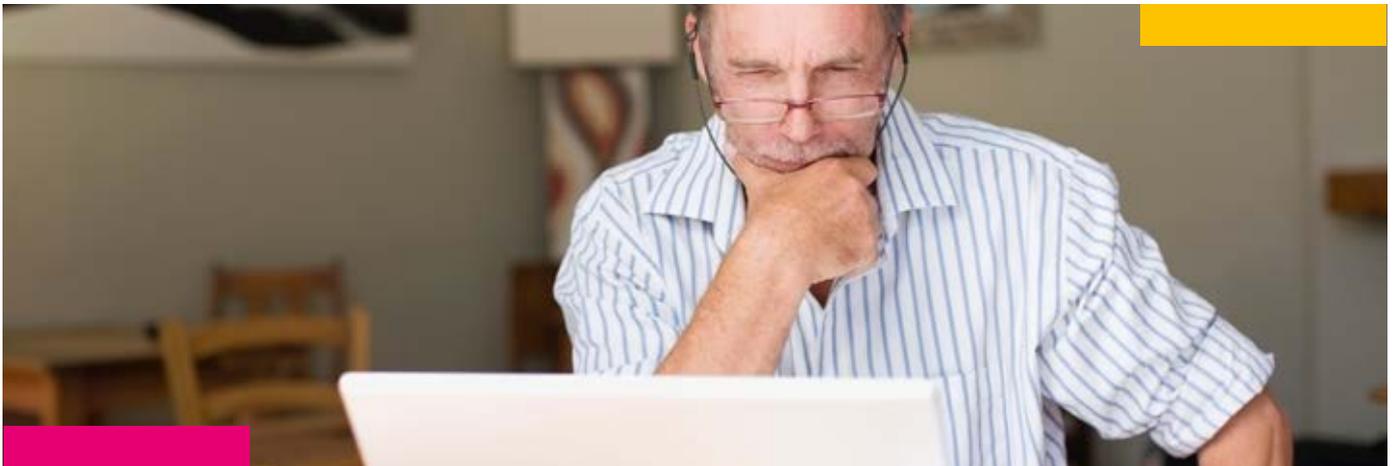


Making a Universal Credit Claim Toolkit

Getting prepared, requesting reasonable adjustments and challenging discrimination



If you need to make a claim for Universal Credit make sure you are prepared and know your rights. If you cannot access the online system you can ask for reasonable adjustments, including support from the DWP, to enable you to access the benefit.

In this 'Making a Claim Toolkit' you will find:

- A checklist to ensure you have everything you need before you apply.
- A guide to requesting support to make a claim.
- A template letter to notify the DWP of your requirements as a claimant with "complex needs".
- A template letter requesting support to make a claim – you can tailor this letter to reflect your individual circumstances.
- A template letter requesting reasonable adjustments to the interview requirement – you can tailor this letter to reflect your individual circumstances.
- An advocacy letter from RNIB. This letter provides a summary of the law and information about the obligations of the DWP as a service provider. You can send this letter with your request for support letter.

If you need any assistance with completing this toolkit, please contact our Sight Loss Advice Service for further assistance. They can be contacted through our helpline number **0303 123 9999** or by email at **helpline.mailbox@rnib.org.uk**

Preparing for a claim

To complete the process of making a claim for Universal Credit you will need to take the following 4 steps:

- gather all the information you need
- create your account
- make your claim
- arrange an interview at the Jobcentre within 7 days of starting your claim

If you do not complete all these steps you may not receive your Universal Credit payment.

Step 1 – Gather information and documents

Before you apply for Universal Credit it is important that you have all the information you need to complete your application.

Getting all your details together in advance will save you time and make it easier to apply. If you are making a joint claim, your partner will need their details too.

On the next page you will find a checklist that you can use to help you ensure you have all the necessary information.

Checklist

You will need all the following details for you and your partner before you start the application:

- your postcode
- your NI number(s)
- details of your bank, building society or credit union account. If you do not have an account you will need to open one or use Simple Payment <https://www.gov.uk/payment-exception-service>
- the type of accommodation you have, e.g. private rent, council tenant, or housing association tenant
- how much rent you pay – this can be found on your rent agreement. If you do not have one, ask your landlord for an accessible copy.
- your landlord's address – this can be found on your rent agreement
- your landlord's phone number
- details of any savings you have and any other 'capital' investments. This includes shares or property that you do not live in.
- details of any income that is not from work. This includes money from a pension or insurance plan.
- details of how much you earn from work – check your recent payslip if you are unsure
- details of any other benefits you receive, including what benefit and how much you receive.
- how much you pay for childcare (if applicable)
- child benefit reference numbers for any children you have if you receive child benefit – this can be found on letters to you about child benefit, it will start with 'CHB' and is made up of 8 numbers and 2 letters. You can phone the Child Benefit Office on 0300 200 3100 if you need help.

Checklist continued

You will need evidence for all the above details when you attend your interview at the Jobcentre. To prepare for this you may need to gather certain documents / evidence for you and your partner such as:

- your tenancy agreement or an up to date rent statement
- wage slips
- a bank statement
- proof of savings
- letter confirming benefit entitlement etc.

To verify your identify in person you will need to bring some documents to your interview. Documents you can use include:

- UK passport
- EEA passport
- UK photo driving licence
- National identity card
- Residence permit or card
- Immigration status document
- Registration or naturalisation certificate

What you need to bring with you to the Jobcentre will be explained to you when you make your online claim.

Step 2 – Create your account

How do I start my application?

There is no paper claim form for Universal Credit and claims can be made online by submitting an electronic claim form: www.gov.uk/universal-credit.

If you can use the online system but you do not have access to a computer, your local Jobcentre, library, Council or Citizens Advice Bureau may have services available for you to use free of charge.

You do not have to make the application in one go – you can save your progress and come back later but you must submit your claim (step 3) within 28 days of creating your account. It is recommended that you try to finish the application process as soon as you can as your claim cannot start until you have completed the whole process.

If you are claiming as a couple each of you will need to set up your own account. If you are the first member of the couple to set up your account, you will be sent a 'linking code'. The second member of the couple to set up their account will need this code to link both claims.

I cannot use the online system – what can I do?

There are three ways to get help with your Universal Credit claim:

1. Help to Claim Service
2. Telephone claim
3. DWP home visiting service

Help to Claim Service

Citizens Advice (England and Wales) and Citizens Advice Scotland provide a Help to Claim Service. This service can support you in the early stages of your Universal Credit claim, from the online application, through to support with your application before your first full payment.

To access this support, contact your local Citizens Advice Bureau.

Telephone claim

If you are unable to claim online, you can make a request to make a **telephone claim**. You will need to give a reason for not being able to apply online. When you make a claim over the phone a DWP adviser will complete the online form for you as you talk through the application. You will need to have all the information in the checklist above before you make this call.

You will also be asked to set security questions. It is recommended that you choose something memorable as you will need to answer these questions each time you contact DWP.

If you are successful in making a telephone claim the Universal Credit Case Manager will set up an account for you, record the data gathered, submit your claim and identify your claim as a phone claim on the system.

Once registered as a telephone claim, you will not be able to manage or maintain your claim online as you will not have a username or password. Instead, you must contact the DWP by phone where the DWP staff will update your journal as and when required. All notifications added to your journal should be sent to you in an accessible format, including your monthly award statement, so it is important to let DWP know what your preferred method of communication is.

DWP home visiting service

If you require additional support, you can also request access to the DWP Home Visiting Team. This is where the DWP would arrange for DWP staff or a "Local Service Support" to visit your home to complete the online form for you.

If you successfully secure a home visit, the DWP Home Visiting Team will call you to book a visit and tell you what to expect, including how to contact them. When the DWP visiting officer arrives at your property they will show you their photo identity card. If you cannot check their photo identity card because of your visual impairment you can agree on a password for the visiting officer to say when they arrive. You need to arrange this before the visit by calling the DWP Home Visiting Team on the number you were provided with.

You can also contact the Universal Credit Helpline to arrange an appointment at your local Jobcentre Plus (JCP) and an adviser will complete the form for you during a **face to face appointment**.

Notify the DWP of your requirements at the earliest opportunity

The DWP has a **duty to make reasonable adjustments** so that you can access and maintain your Universal Credit claim. This duty is set out in the Equality Act 2010 and the DWP cannot avoid it by for example, suggesting that your family and friends help you.

The DWP also has to follow its own guidance on how to support claimants with **"complex needs"**. Once a claimant is identified as having 'complex needs' it must be noted on their record what additional support they require so that it is available every time you need it.

The DWP's 'Complex needs guidance' gives a list of examples of life events, personal circumstances, health issues and disabilities that could result in a claimant having 'complex needs'. Claimants who are blind or partially sighted are noted in this list.

Formally notifying the DWP of your visual impairment, what support is most suitable for you and your preferred method of communication is the best way to ensure appropriate adjustments are made for you. Once you notify the DWP it will be noted on your record and all DWP staff must make sure adjustments are made and tailored support is provided. If a note is made on your record you will also have a stronger case to make a complaint if the DWP fail to provide suitable support and adjustments.

You can use the template letter – 'Complex needs notification' to help you let the DWP know what your requirements are. Remember to change this letter to your individual circumstances and to keep a copy of the letter for your own records.

I cannot get help to make my claim – what can I do?

If you cannot make a claim online because of your visual impairment and you are having difficulty accessing telephone, face to face or home visiting support, it is recommended that you make your request in writing.

The DWP has a duty to make reasonable adjustments so that you can make your claim and formally requesting support from the DWP is the easiest way for you to inform them about the difficulties you have with the online system and why you need an alternative method of claiming.

You can use the template letter – 'Request support to claim' to help you make this request. Remember to change this letter to your individual circumstances and to keep a copy of the letter for your own records.

Step 3 – Make your claim

Once you have answered all the questions in the application, you have successfully set up your account and you can now **make your claim**.

You will now need to complete your **'to-do' list**. A 'to-do' is an action that you need to complete to progress your claim. You should go through the list answering all the questions. You will need to complete this list **within 28 days** of setting up your account, but you should aim to complete it as soon as possible so that your claim can progress.

Once you have finished all the "to-do's", you will have to tick a declaration confirming that the information you have provided is accurate. Once this is done, the claim has been submitted.

Note – Your claim for Universal Credit will not be finished until all your 'to-dos' have been completed and you have declared that the information is correct.

Declaring your disability

As part of making your claim you will be asked if you have either a health condition or a disability which prevents, or limits, your ability to work. If this applies to you, you should answer 'yes' to this question.

It is recommended that you submit medical evidence of your disability to the DWP when you make your claim. If you do not submit medical evidence at this time you will be required to do so from the 8th day of your claim. This will normally be a Statement of Fitness for Work (SoFFW), often referred to as a fit note, sick note, medical certificate or doctor's note. This can be provided by a doctor or General Practitioner (GP).

Verifying your identity

One of the items on your to-do list will ask you to **'Verify your identity online'**. This takes you to a government system called 'Verify' to confirm your identity and it uses companies such as the Post Office or Barclays to confirm your identity to the DWP.

Verify can be difficult to complete. If you have difficulty completing this action, go back to your Universal Credit account and click on 'I can't do this online'. You can then skip this step and confirm your identity at your local Jobcentre. You will need some proof of identity such as a passport, driving licence or bank card.

Step 4 – Arrange an interview at the Jobcentre

Depending on the information you provided in your application you may now be asked to arrange an interview at your local Jobcentre. You will need to do this **within 7 days of applying online**. If you do not arrange the interview in time you might have to start your application again.

You should be given a **phone number to call to arrange your interview** after you apply online, if you do not receive this number call the Universal Credit Helpline on **0800 328 5644** to arrange your interview. You may be asked for your National Insurance number when you call.

The person you speak to on the Universal Credit Helpline will book an appointment for you. This is likely to take place at your local Jobcentre.

If you have made an online claim details of your appointment will be shown in your online Universal Credit journal. If you have made a telephone claim, you can request for details of your appointment to be sent to you in an accessible format.

If your circumstances mean that you do not need to come to the Jobcentre, your online account or Universal Credit Case Manager will provide you with information on what you need to do instead.

Notify the DWP of your requirements at the interview

If you did not send the 'Complex needs notification' letter to the DWP when you were completing your application, it is recommended that you complete it at this stage and bring it to your interview at the Jobcentre. You should hand it in to your Work Coach along with any other relevant paperwork. Remember to change this letter to your individual circumstances and to keep a copy of the letter for your own records.

I cannot attend an interview – what can I do?

If you cannot travel to the interview because of your visual impairment or other disability it is recommended that you call the Universal Credit Helpline as soon as possible to request a reasonable adjustment.

The DWP has a duty to make reasonable adjustments so you can take part in the interview. They cannot avoid this duty by suggesting that your family and friends should help you to attend the Jobcentre interview.

For example, you can ask for your interview to be at a place that is familiar to you, so you are able to travel there, or if you have made a telephone claim it may be suitable for you to have a telephone interview.

If the DWP refuse to make appropriate reasonable adjustments to enable you to take part in an interview it is recommended that you make your request in writing. Formally requesting a reasonable adjustment from the DWP is the easiest way for you to let them know about the difficulties you have with travelling to the Jobcentre and why you need an alternative.

You can use the template letter – “Request an adjustment to the interview requirement” to help you make this request. You should send this letter to your local Jobcentre. Remember to change this letter to fit your individual circumstances and to keep a copy of the letter for your own records.

Assistance available from RNIB

We strongly suggest that you have a benefit check to make sure you are entitled to Universal Credit before applying. Please contact our Sight Loss Advice Service for further assistance. They can be contacted through our helpline number **0303 123 9999** or by email at **helpline.mailbox@rnib.org.uk**.

Our Helpline is your direct line to the support, advice and services you need. Whether you want to know more about your eye condition, buy a product from our shop, join our library, find out about possible benefit entitlements, or be put in touch with a trained counsellor, we're only a call away.

It's also a way for you to join RNIB Connect, our community for anyone affected by sight loss. RNIB Connect is free to join and you'll have the chance to meet other people with similar experiences in our helpful, welcoming and supportive community.

Give us a call today to find out how we can help you.