

Citizens Advice Scotland Managed Migration Quarterly Report

Quarter 2 July to October 2024

Purpose

Citizen's Advice Scotland (CAS) is Scotland's largest provider of independent advice through its network of 59 Citizen's Advice Bureaux (CAB). This briefing provides an overview of the network's unique insight into issues relating to managed migration (MM) to Universal Credit (UC) across Scotland during Quarter (Q) 2

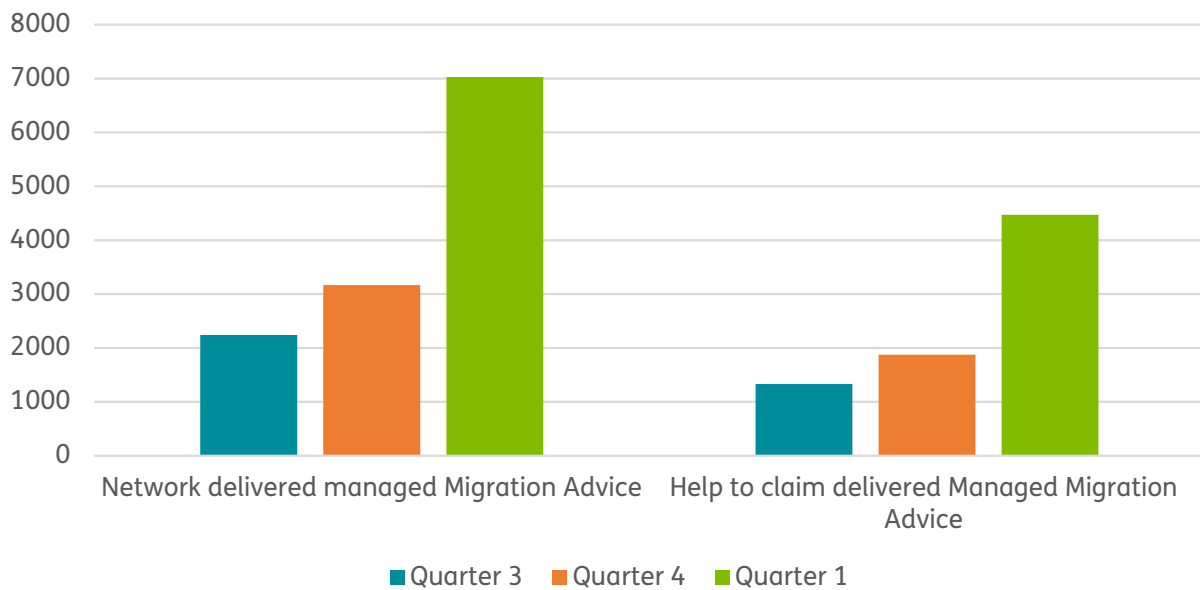
Summary

- > 50% of all advice work in Q2 related to benefits. UC represented 30% of that work.
- > The network supported a total of 10,965 people with a UC enquiry in Q2.
- > People seeking advice about UC more likely to be female, and to be aged between 45-59.
- > 38% of all those that we supported with UC are recorded as having a caring responsibility. Of those we supported with managed migration, that proportion rises to 64%.
- > 45% of all clients that we supported with managed migration in Q2 are recorded as caring for an adult or child with a disability.
- > 26% of our UC clients in Q2 were recorded as being either part-time, full-time or self-employed. 31% were recorded as being unable to work for health reasons; 42% of those we support with UC are recorded as having a health condition.
- > More than half of people seeking UC advice from us (61%) are living in areas with the highest level of multiple deprivation. 10% are living in remote areas.
- > The majority, 18%, of the advice provided about managed migration in Q2 concerned how to respond to a Migration Notice prior to the final deadline date and migrating from Housing Benefit (17%). 15% concerned Transitional Element.

Key numbers

- > In total the network logged 7028 contacts related to Managed migration advice this Q, distributed across 1470 unique clients. Managed migration now represents 17% of UC advice work being delivered by the network.
- > Growth in demand for managed migration advice has been substantial this Q relative to the previous Q, up 45% across the network as a whole and 41% with the Help to Claim service.

Network wide Managed Migration advice work



Key advice issues

- > 25% of advice provided about UC concerned entitlement and the claims process. Limited Capability for Work- and Work-Related activity and the associated Work Capability Assessment was the next largest advice area, representing 15% of UC advice work this Q.
- > Sanctions are a significant component of the UC support being provided by the CAS network. The network has experienced an increase of 18% in the volume of advice that we provided about UC sanctions in Q2 of 2024-2025 relative to Q2 of 2023-2024. The volume and proportion of advice being provided about UC sanctions is equivalent to advice about UC appeals.
- > 2% of UC advice provided this Q concerned conditionality requirements, equivalent in volume and proportion to advice about UC Mandatory Reconsiderations

PART 2: Breakdown of issues

This summary is of experiences across the network during Q2 submitted through our Social Policy Feedback (SPF) system. This system is designed to pick up patterns of policy related detriment and is necessarily subjective and reflective of negative experiences.

Getting started

- > Digital access and literacy can represent a real barrier to migration, as well as to maintaining the claim going forward.

Caroline sought support from her local CAB having received a Migration Notice. Claire receives Income Support and Housing Benefit. She has no internet access. Claire had contacted the DWP's helpline for people moving to UC via managed migration; despite her advising the call handler that she has no digital access and is waiting for an appointment with a CAB, she was not offered any alternative ways of accessing UC, but instead was given an extension to the deadline for claiming in the expectation that she would later claim online. Caroline explained to the CAB that the call handler had asked if "she had the confidence to deal with this herself" and when she answered no she was not offered any further advice. Caroline feels very overwhelmed by the process and that she has insufficient information to take control of the journey, not being able to access online information about UC.

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- > Challenges ensuring that all legacy benefit information is received in time to correctly process the new UC award have had a considerable impact, causing severe anxiety, placing additional administrative burdens on individuals, and in some cases causing acute financial hardship. This has primarily concerned information about children, and information about capability for work.

Debbie approached her local CAB for support with her UC claim. Debbie had claimed UC online in response to a migration notice. Her first payment of the benefit had not reflected the fact that she has two children, one of whom has a disability and is in receipt of Child Disability Payment (CDP). The CAB successfully supported Debbie to submit an MR challenging the award. Backdated entitlement was paid. However, the second monthly payment was also a significant underpayment; the Transitional Element to which Debbie had been entitled had been eroded on the incorrect assumption that her circumstances had changed resulting in an increase in UC entitlement (Child Element). The CAB escalated the case. This resolved UC entitlement, but Debbie soon found herself subject to recovery of an overpayment of £326 since Tax Credits had erroneously continued in payment during the process.

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- > Better off calculations when moving are very complex for individuals to navigate without appropriate advice.

Claire approached her local CAB for support to complete a managed migration from Income Support including an award of Severe Disability Premium. Claire provides full-time care for her husband Jim and receives Carer's Allowance to reflect this. Claire has significant health issues of her own and is unable to work. Both members of the couple receive extra cost disability benefit that include an Enhanced Rate Daily Living component. A calculation completed by their CAB adviser showed that the couple should receive £89.47 Transitional Element. However, if the couple were to be assessed as Limited Capacity for Work Related Activity (LCWRA), they would be adversely impacted financially by the move to UC. This is because the assessment for LCWRA is unlikely to be completed within the couple's the first UC assessment period, meaning that they would lose their TE to erosion and would be worse off by £39.19 per week.

After the claim has been processed

- > The impact of what is for many people a “re-engagement” with the Department for Work and Pensions cannot be overstated. This can involve the trauma of re-telling and an exacerbation in mental health conditions linked to anxiety.

Anita sought support from her local CAB with her UC claim. Anita was in receipt of Income Support (IS), and Housing Benefit (HB) and moved to UC in accordance with a Migration Notice. Anita has complex health needs; she receives Severe Disability Premium and Adult Disability Payment (ADP). Anita has been advised that she will need to complete a Work Capability Assessment since she is migrating from IS and not Employment Support Allowance (ESA). Anita is very anxious about what this involves. Her CAB adviser describes the “administrative and emotional burden” that the journey will place on her.

- > In many cases, locally administered support linked to legacy benefit awards is being disrupted, creating a significant administrative burden for individuals and agencies, and acute financial hardship.

Kate was referred to her local CAB by her Housing Association. Kate is a full-time carer. She migrated to UC in June 2024 from Income Support and Housing Benefit. Shortly thereafter a payment of £128 was taken by Direct Debit from her bank account. Kate had established the Direct Debit to ensure payment of water and sewerage, an amount of £28/monthly. Kate’s Council Tax Reduction (CTR) award had been terminated, leaving her liable to pay in full. Prior to attending the CAB, Kate had spoken to her local authority and was advised that all that would be required to reinstate CTR is a copy of her Universal Credit payment statement. Kate supplied this in July when she received it. She was then advised that since the CTR claim had been closed she would have to make a new application. The CAB supported her to reclaim and receive a backdated payment covering the £100 taken.



PART 3: Our recommendations

- > Improvements to digital systems to better ensure timely across benefit product information sharing. While this work is ongoing, the pace of migration should be slowed, particularly for those with complex needs.
- > Improvements to digital systems with a view to automatically populating UC forms as far as possible for those migrating from ESA, reducing administrative burden on individuals and DWP.
- > Improved and timeous intra-agency information sharing to enable increased automated passporting and streamlining of entitlements.
- > Adequate resourcing and provision of independent advice services to ensure that support is available via all means (telephony, video conferencing, in person, using person appropriate communication such as language interpretation and BSL). Adequate resourcing means responding to the additional expense and logistical difficulties of travel as well as more limited digital connectivity associated with living in remote and rural areas unique to Scotland.
- > Adequate resourcing of Advanced Customer Support Service Leads (ACSSLs), who represent the frontline of safeguarding people with the most complex needs. Currently there are only six in Scotland.

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