

Short Term Benefit Advances for Jobcentres

1. Claimants may express a need for crisis support as part of their interaction with DWP staff:
 - during an initial conversation with a [Customer Service Manager](#) when they first enter the office
 - as part of the conversation with a Customer Service Officer when making a new claim or reporting a change of circumstances
 - when attending an advisory interview – for example New Jobseeker Interview or Jobsearch Review.

Offering help and support

2. Depending on the claimant's circumstances, they should be directed to the support appropriate to them. This could be:
 - DWP support, for example [Social Fund Support](#)
 - [STBAs](#)
 - [Local crisis support](#)

Offering information about STBAs

3. Offer further information about STBAs to the claimant. Before considering making a request for an STBA, the claimant **must** have made a claim to benefit.

Offering information about local crisis support

4. To advise the claimant about the local help and support in their area and how to access it, deal with the enquiry according to current local arrangements. Access the [District Provision Tool](#) to research local help and support in the claimant's local area.

Claimant requests support as part of making a claim to Guardians Allowance

5. Where a claimant declares financial need and is eligible for Guardians Allowance only, they should be advised to make contact with HMRC contact for more information about the support available to them.

Support for 16/17 year olds

6. Where a claimant is 16/17 years old and requests support, they should be offered local crisis support before being referred to the Specialist Adviser.
7. Where appropriate, complete the STBA Request Template for the 16/17 year old and submit it to the Benefit Centre for consideration.
8. Where the 16/17 year old declares a financial need during the new claims interview, the Specialist Adviser should complete the STBA request template.

Checking if claimant has made a Clerical claim

9. Where a claimant has previously made a clerical claim and details are not yet available on the benefit system, check in LMS conversations to confirm that the claimant has made a claim to benefit.

Completing and submitting the STBA request

10. To submit the STBA request template to the Benefit Centre, take the following action:

Step	Action
1	Access the Handover Telephony Tool (HOTT) to select the STBA template
2	Complete sections 1 to 5 of the Data Capture tab of the STBA request template with all of the available details about the claimant, confirming with them that they are correct.
3	Select 'Standard Call Back' from the dropdown menu in the Handover Priority field and 'Benefit Centre' as Office Type
4	Select 'STBA New Claim' (New claim) or 'STBA Maintenance' (change of circumstances) as the 'Handover Type'
5	Select 'STBA request' as the Handover Reason
6	Click on the 'save' button at the bottom of the Data Capture tab of the STBA Request Template. This will lock the Data Capture tab and allow no further changes to the information NOTE: this action must be done before submitting the STBA Request Template to the Benefit Centre
7	Follow the Handover Telephony Tool (HOTT) guidance to enter the claimant's postcode and search for the relevant benefit centre
8	Follow the Handover Telephony Tool (HOTT) guidance to send the request to the Benefit Centre
9	Tell the claimant what will happen next
10	Access the claimant's LMS record and input standard text 'STBA request taken {date}'

Special Customer Records

11. If the claimant has a special customer record, follow [completing and submitting the STBA request template](#) steps 1 to 2, taking the following additional steps to ensure compliance with [special customer records guidance](#):

Step	Action
1	Complete the fields on the template as follows: <ul style="list-style-type: none">• Surname – the claimant's surname followed by 'see address'• Postcode – SCR

	<ul style="list-style-type: none"> • NINO – XX111111X • House number - XX
2	Capture as much information as possible from the claimant, being aware of the sensitivity of the records
3	Continue with steps 3 to 8 of completing and submitting the STBA request template

Claimants without a National Insurance Number

12. Where a claimant requests additional financial support but does not have a National Insurance Number, an STBA should still be considered, providing:

- they have made a claim to benefit;
- they meet other [conditions of entitlement for an STBA](#); and
- they can provide evidence of their identity in line with the confirming identity guidelines relevant to the appropriate benefit

13. Where a claimant does not have a National Insurance Number, use in AA123456A in place of the National Insurance Number on the STBA request template.

Claimants without access to a telephone

14. Where a claimant requests an STBA but does not have access to a telephone to receive a call back, take the following action to arrange for them to receive an update:

Step	Action
1	Complete sections 1 to 5 of the Data Capture Tab of the STBA request template with the claimant's details
2	In the 'supporting information' box in section 3, add an appropriate local office number or alternative representative to receive a call back
3	Tell the claimant what happens next and offer them an appointment to give them an update or a decision.

Telling the claimant what happens next

15. Whilst the claimant is still in the office, confirm that you have captured as much information as possible about why the claimant is requesting an STBA, and that the information captured is accurate. Tell the claimant that:

- they will receive a first callback/textphone call within the next 3 hours
- they will get a decision on whether they will receive an STBA by the next working day

Claimant asks for a progress update

16. Claimants may ask for an update on the progress of their request for an STBA.

17. If a claimant asks for a progress update, take the following action:

Step	Action
1	Access HOTT to check on the previous call history
2	Check the appropriate benefit system notepad where available to check the current status of the request
3	Tell the claimant what happens next
4	If HOTT shows that the STBA template has been sent to the Customer Service Officer or Decision Maker, and that: <ul style="list-style-type: none"> no callback has been made within 3 hours of the handover to the Benefit Centre or no callback has been made within 24 hours where the request has been sent to a Decision Maker access the HOTT 'Handover Creation' screen and create a priority duplicate handover by selecting 'Priority Duplicate' from the Handover Priority dropdown menu. In this case, inform the claimant that they can expect a callback within 1 working hour.
5	Select 'STBA New Claim' (New claim) or 'STBA Maintenance' (change of circumstances) as the Handover Type
6	Select 'Progress Chasing' as the Handover Reason
7	Follow the Handover Telephony Tool (HOTT) guidance to enter the claimant's postcode and search for the relevant Benefit Centre
8	Send the handover to the Benefit Centre

Visiting Officer role in taking STBA requests

18. A claimant may ask for additional support during an interaction with a Visiting Officer. Where a claimant requests an advance of benefit, the Visiting Officer should take the following action to ensure that the request is captured:

Step	Action
1	Where appropriate, Complete sections 1 to 5 of the Data Capture Tab of the STBA request template with the claimant's details or refer them to the Benefit Enquiry Line to make a request
2	Follow local processes to access information on locally available support
3	On returning to the office, scan the claim documentation and STBA request template and e-mail them to the relevant Benefit Centre with the 'standard text' in the e-mail header. Benefit Centre staff will then enter the data into an electronic version of the template.

Claimant asks for STBA repayments to be rescheduled

19. During any interaction in a Jobcentre, a claimant may request that their STBA repayments are reduced/rescheduled as they can no longer afford the repayments.
20. Rescheduling **should only** be considered on the request of the claimant and where a change in their circumstances has resulted in a reduction in their personal allowance, for example where a claimant had a joint claim or claimed as a couple and has separated from their partner so will now no longer have a joint claim.
21. Where a claimant's personal allowance has reduced then a Decision Maker will need to decide whether repayments can be rescheduled and will contact the claimant to discuss this with them.
22. As part of the interaction with the claimant, staff should question them to find out why they need their repayments rescheduling. Depending on the claimant's circumstances, take the appropriate action to request their repayments to be rescheduled.

Claimant is reporting a change of circumstances and asks for STBA repayments to be rescheduled

23. Where a claimant reports a change of circumstances during an interaction in a Jobcentre Plus office and asks for STBA repayments to be rescheduled, take the following action:

Step	Action
1	Capture details of change of circumstances and submit these to the Benefit Centre via a HOTT handover
2	Add a note on the HOTT handover to say 'Claimant requests Rescheduling of STBA repayments'
3	<p>Tell the claimant that:</p> <ul style="list-style-type: none"> • their change of circumstance will be processed in the usual way • their request for rescheduling will also be considered in due course. • a Decision Maker will contact them to discuss rescheduling repayments of their advance <p>Note: STBA rescheduling requests will not be treated as urgent.</p>

Claimant asks for STBA repayments to be rescheduled and has previously notified a change of circumstances

24. Where a claimant has already notified DWP of a change in their circumstances, is in receipt of a lower amount of benefit and is now asking for their STBA repayments to be rescheduled, take the following action:

Step	Action
1	Open HOTT and create a handover to the appropriate Benefit Centre and select 'non call back'. Add all available information to

	<p>the handover. This should include:</p> <ul style="list-style-type: none"> • The claimant has requested their STBA repayments to be rescheduled • The reason why the claimant has asked for repayments to be rescheduled • The amount the claimant has said they can repay
2	<p>Tell the claimant that:</p> <ul style="list-style-type: none"> • their request for rescheduling will be considered in due course. • a Decision Maker will contact them to discuss rescheduling repayments of their advance <p>Note: STBA rescheduling requests will not be treated as urgent.</p>

Claimant asks for STBA repayments to be rescheduled but has not reported a relevant change of circumstances

25. Where a claimant asks for advance repayments to be rescheduled, consider whether:
- the claimant has reported a change of circumstances
 - the change of circumstances may affect the claimant's benefit.
26. An example of where rescheduling is appropriate is:
- A claimant moves in with their partner
27. Examples of changes of circumstances which would not affect benefit and therefore rescheduling is not appropriate:
- A change of address
 - A change to bank account details.
28. Where no rescheduling is appropriate, take the following action:

Step	Action
1	Tell the claimant that rescheduling of their advance repayments cannot be considered in their circumstances
2	Offer the claimant information about other support in their area

29. Where a claimant asks for repayments to be rescheduled which are not an advance of their benefit, staff should refer to the usual arrangements for redirecting these enquiries.