




# A Step by Step guide to making and maintaining a Universal Credit claim online

# Before you make a Universal Credit Claim



To make a Universal Credit claim, you will need:

- **Email address**
  - **Your personal information**  
(name, address and phone number)
  - **Details of your income and savings**
  - **Bank account details**
  - **Childcare costs details** (if appropriate)
  - **Housing costs details** (rent/mortgage costs, landlord/mortgage provider details etc)
  - **Internet access**
  - **Proof of Identity**
- 

Information correct at time of publishing

## Step 1


# How to create an account for Universal Credit

## Creating an account

Signing up for Universal Credit is simple.  
To register online click on the link

[www.nidirect.gov.uk/apply-universal-credit](http://www.nidirect.gov.uk/apply-universal-credit)

Enter your postcode and click on the green button that reads 'Start' to begin. Making a claim may take up to 30 minutes for a single person and up to an hour for a couple.

 **GOV.UK** **Universal Credit**

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**TRAINING01** External environment description

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## Universal Credit online

Use this service to:

- start a Universal Credit claim
- switch your Universal Credit account online
- join your partner's Universal Credit claim

**Enter your postcode**

[Start](#)

[▶ Don't know what postcode to use?](#)

**Already got an online account?**  
[Sign in](#) if you already have an online account and want to return to a claim.

If you have already set up your account select the option to **'sign in'** to your online account.

Next, you will be asked if you have any children living in your household and offered three options. Your answers will determine the questions you are asked after this.

## How many children live with you?

'Children' are 19 or younger, and might include:

- your own and your partner's children
- any children you've adopted
- children you're the legal guardian for

Do not include:

- foster children
- children you aren't responsible for - for example, your sister's children if she lives with you

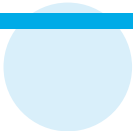
No children live with me

1 or 2 children live with me

3 or more children live with me

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If you answer, one or two children live with me, you will be asked for your children's details.

Should you answer three or more children, the following message will appear:

## You can't get Universal Credit at the moment

You can't make a new claim for Universal Credit if you have three or more children.

You might still be able to get Universal Credit if either:

- you've claimed it in the last 6 months - [sign in to your existing account](#)
- you're joining your partner's existing claim - [create an account](#) and use your 'linking code' when asked for it. Your partner should have given you this code

You will not be able to proceed further and should consider whether you would be entitled to another benefit.

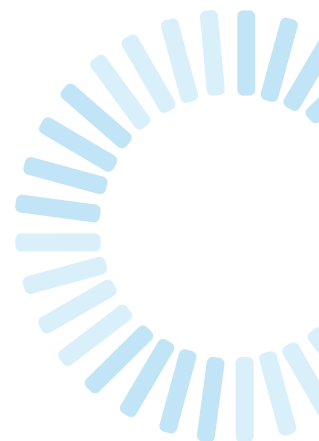
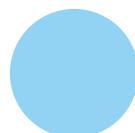
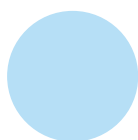
From the initial screen you can create an account, sign in to an existing account, or link accounts together using a partner code to show that you're part of a couple.

You will be asked to create a username and password as requested.

Take a note of your username and password for future use. It is important that you do not share your username and password with anyone.

You will then be prompted to choose two security questions from a range of options.

One of these security questions will be asked when you use your account in the future.



## Recording your Personal Details

### Confirm your email

An email code has been sent to **Example@hotmail.co.uk**. The code is only valid for 1 hour and will expire at **2:14pm**.

#### Email code

[▶ My code has expired](#)

[▶ I haven't received the email](#)

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You will be asked for details such as your name, date of birth and email address.

After entering in some personal details, you need to choose how you want to be contacted by the Department for Communities.

An email code will be sent to your email address. This code should be entered to

confirm your email account. If your code has expired (as it is more than one hour from you requested the code) you can have another code sent to you by clicking the **My code has expired** link.

You will now be asked for your address details.



You have now successfully set up an account for Universal Credit; you can now make your claim. You have 28 days in which to do this,

otherwise you will need to make a new account for Universal Credit.

## Account created

Make a claim within 28 days or you'll have to create your account again.

You may need details of:

- housing costs and any rent agreement
- any savings and income, including other benefits
- people who live with you

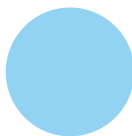
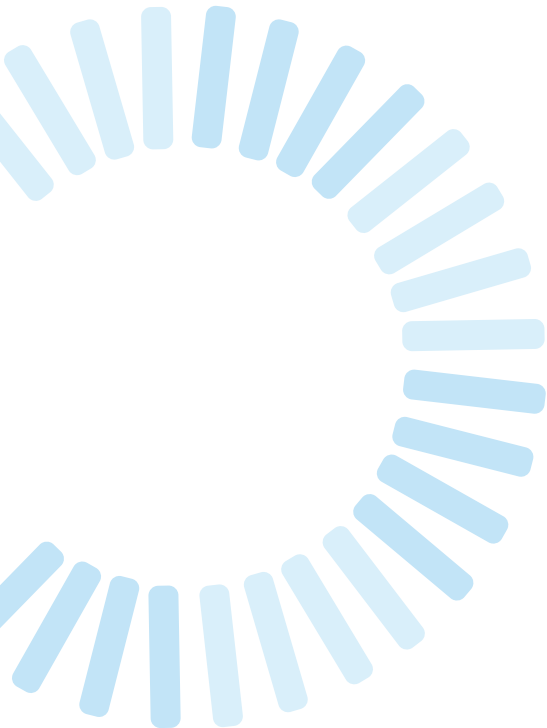
If you don't have these details, you can still start your claim.



You may be prosecuted or need to pay a penalty if you give wrong or incomplete information.

[Make a claim](#)

To proceed to the claim stage, click **Make a claim**.





Step 2

Single or  
joint claim?



You will now be asked whether you are making a claim as a single person or as a couple.

If you do not have a partner choose **'No I'm single'** and proceed to **Step 3**.

Choose from the three options given. If you choose the first option, 'Yes, and we live together' the following message will appear:

## Make a joint claim

You and your partner need to claim together. You can't claim by yourself.

What you'll get depends on your circumstances as a couple, including your incomes.

You still need to make a joint claim if your partner is working, or is in the UK on a visa.

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You will then be advised that you need to link your details with your partner's details and you will need a linking code to be able to do this. If your partner has already submitted

a claim to Universal Credit and declared a partner, they may already have been given a linking code.

## Link your details -

To make a joint claim, you need to link your details with your partner's. You need a linking code to do this.

### Do you need a linking code?

If your partner has started a joint claim, they'll have a linking code for you.

Yes, give me a linking code for my partner

No, my partner gave me a linking code

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If you asked for a linking code to be provided, the next screen will offer a code for input by your partner when they make their claim to Universal Credit.

## Give this linking code to your partner

Your partner will need their own Universal Credit account. They'll be asked for the code when linking to your details.

**NKBM Q4GR**

This code is valid until 25 September 2017.

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**Take a note of this code as you will need it later in the claim process.**

## Step 3

# Making your Universal Credit claim

## Completing your To Dos

A To Do is an action that you need to complete in order to progress your claim to Universal Credit.

To Dos can be completed in any order and it is essential that each To Do is completed.

Some To Dos are reactive questions depending on the information you give. You will only be asked specific questions if they relate to you. So if you have no children in your house for example, no other questions about children will be asked.

| To-do list  | Journal |
|---|---------|
| <a href="#">Nationality</a>                       |         |
| <a href="#">Housing</a>                           |         |
| <a href="#">Who lives with you?</a>               |         |
| <a href="#">Work and earnings</a>                 |         |
| <a href="#">Savings and investments</a>           |         |
| <a href="#">Income other than earnings</a>        |         |
| <a href="#">Are you in education or training?</a> |         |
| <a href="#">Health</a>                            |         |
| <a href="#">Caring for someone</a>                |         |
| <a href="#">Bank account details</a>              |         |

Completed items appear in your [journal](#).

By selecting the option that applies to you and pressing 'done', the To Do is completed, removed from your list and stored in your account for future reference.

Information is saved after each page so if you need to stop for any reason you can return to where you left off.

**However, 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.**

An example of a To Do is:

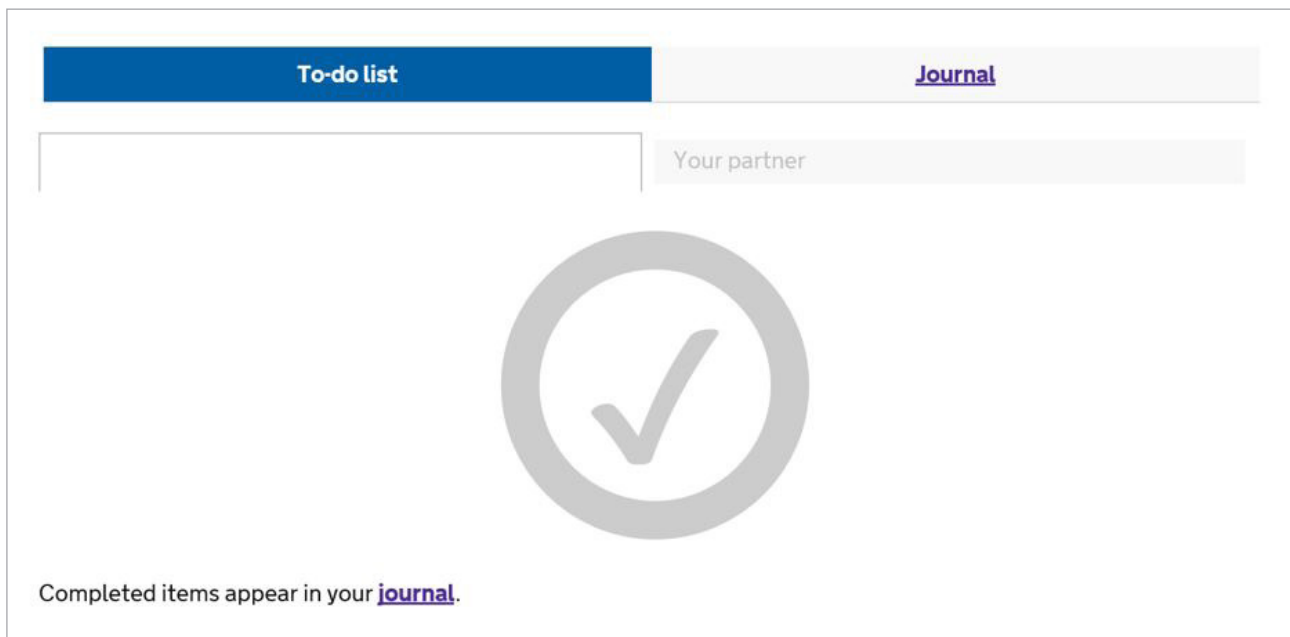
### What information is required?

Information will be requested on:

- savings
- earnings
- health
- additional benefits
- other people living in your household
- your living situation
- your bank account details
- nationality

The screenshot shows a user interface with two tabs: 'To-do list' (active) and 'Journal'. Under 'To-do list', there is an information icon and the heading 'Address'. Below this, it says 'This task is now complete.' A light blue box contains a task: 'Your partner still needs to set up a Universal Credit account. They will have to enter this linking code: **NKBM Q4GR**. They have until 25 September 2017.' Below this is a search bar with the text 'Your partner'. At the bottom, there are four links: 'Nationality', 'Housing', 'Who lives with you?', and 'Work and earnings'.

When a To Do has been completed, the following message will appear:



You will now be asked for your bank account details. You will need your bank/building society name, account holder name, sort code and account number.

When you have done this, you will be advised that this To Do has been cleared and it will be moved to your journal.

# Your Journal

[To-do list](#) **Journal**

## Journal

You can't add an entry to your journal until you've made a claim.

### Account history

|                      |                                  |
|----------------------|----------------------------------|
| 29 August 2017 13:38 | Do you have a partner? completed |
| 29 August 2017 13:28 | Address completed                |
| 29 August 2017 13:27 | Contact details completed        |

Your journal keeps a history of the actions throughout the lifetime of your account. Your journal will show completed To Dos as well as messages between you and your Work Coach.



## Step 4

# Adding a partner to your claim



If you have a partner, they now need to make their own claim to Universal Credit and link it to yours using the partner linking code provided previously. To do this you will need to sign out of your account and ask your partner to create an account or sign in if they already have an account.

Your partner should follow steps 1–3 of this instruction. They will be asked to input the linking code, your first name and postcode to ensure their account is linked to the correct account for you.

You will each have your unique username and password and you'll be able to see each other's To Dos.

## Link your details -

To make a joint claim, you must link your details with your partner's. You need a linking code to do this.

### Do you need a linking code?

Yes, give me a linking code for my partner

No, I want to use the linking code my partner got

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## Link your accounts

### Enter the linking code from your partner

### Your partner's first name

Give it exactly as they did when they set up their account.

### Postcode

Next

Again your partner will be asked to disclose details of their income, health, savings, nationality, housing etc.



**To-do list** [Journal](#)

Your details are now linked with your partner's.

Partner 1 Partner 2

[Nationality](#)

[Who lives with you?](#)

[Work and earnings](#)

If your partner is satisfied that all the information they have submitted is correct,

they can confirm the details are correct by clicking the link highlighted.

## Income other than earnings

Partner 1 doesn't have income other than earnings

Partner 1 is not receiving Armed Forces Independence Payment

[See full details \(opens in new window\)](#)

### Are these details correct?

Yes  No, change this

---

I agree with the full details of my claim.

**Next**

## Your Commitment

Both you and your partner will be made aware of your responsibilities for example, to actively look for work in order to receive Universal Credit. You will be asked to make an appointment with your Work Coach to agree

your Commitment once your claim has been submitted. Your Commitment will clearly outline what will happen if you do not meet your responsibilities.

[To-do list](#)

[Journal](#)

### Your responsibilities

#### Thank you,

There are a few things you need to know and do before your application to Universal Credit is complete.

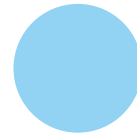
**It's important that you understand that in return for your Universal Credit payment you're agreeing to look for work.**


You'll need to commit to doing everything you reasonably can to find and take paid work. Your work coach will help you agree your commitments.

I understand these commitments

Next

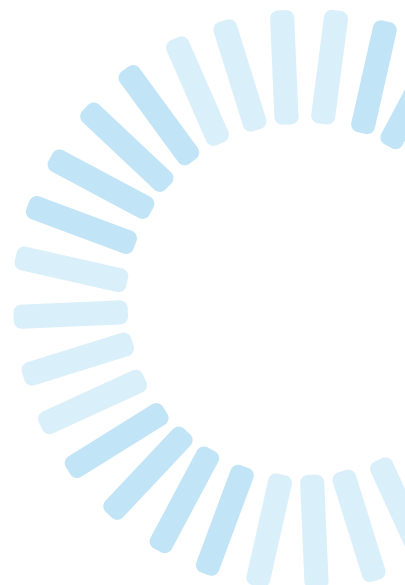
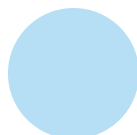
# Your Declaration



| <a href="#">To-do list</a>  | <a href="#">Journal</a> |
|---|-------------------------|
| <h2>Declaration</h2> <p>By submitting this claim, you agree:</p> <ul style="list-style-type: none"><li>• the information you've given is complete and correct</li><li>• you'll report changes to your circumstances promptly in your online account (or call 0345 600 4272 if this isn't possible)</li></ul> <div style="border: 1px solid #ccc; padding: 10px;"><p> You may be prosecuted or need to pay a penalty if you give wrong or incomplete information, or you don't report changes. Your Universal Credit can be reduced or stopped.</p></div> <p><input type="checkbox"/> I agree</p> <p><a href="#">Submit claim</a></p> |                         |

A summary is provided of the details you and your partner have entered with an option to agree or change the details input on each individual entry.

If everything is correct, you'll be able to proceed to Your Commitment which outlines the activities you need to complete in order to receive Universal Credit.



## Customer Survey Questions (Optional)

You are asked to complete a few optional questions to help the Department for Communities gather information about who

needed help to complete an online claim and who provided this help.

### Before you continue

Help us improve the service by answering some questions. They are optional and will not affect your claim.

#### Did anyone help you make your claim?

For example, a family member, friend or someone from the Jobcentre or a charity.

Yes  No

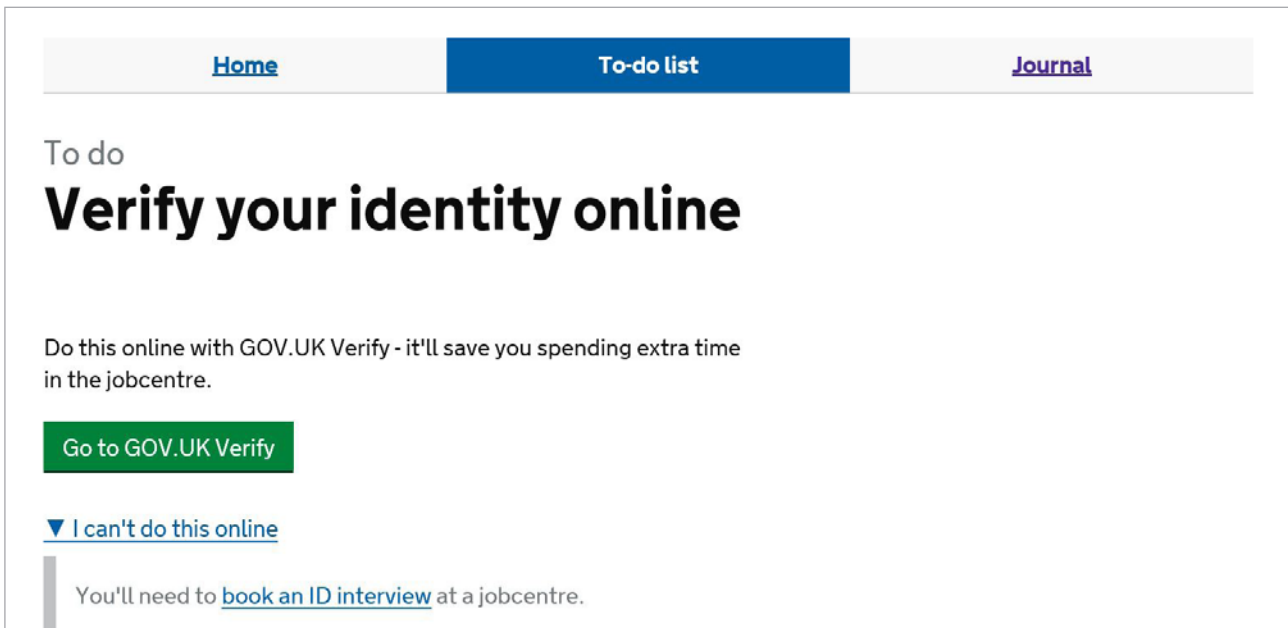
[Done](#) [Skip](#)

## What next?

You will now need to verify your identity, you can do this online at Gov.uk or at your local office.

To verify online visit [www.gov.uk/verify](https://www.gov.uk/verify)

If you can't verify online, this will need to be done at your local JobCentre or Jobs & Benefits office.



[Home](#) **To-do list** [Journal](#)

To do

### Verify your identity online

Do this online with GOV.UK Verify - it'll save you spending extra time in the jobcentre.

[Go to GOV.UK Verify](#)

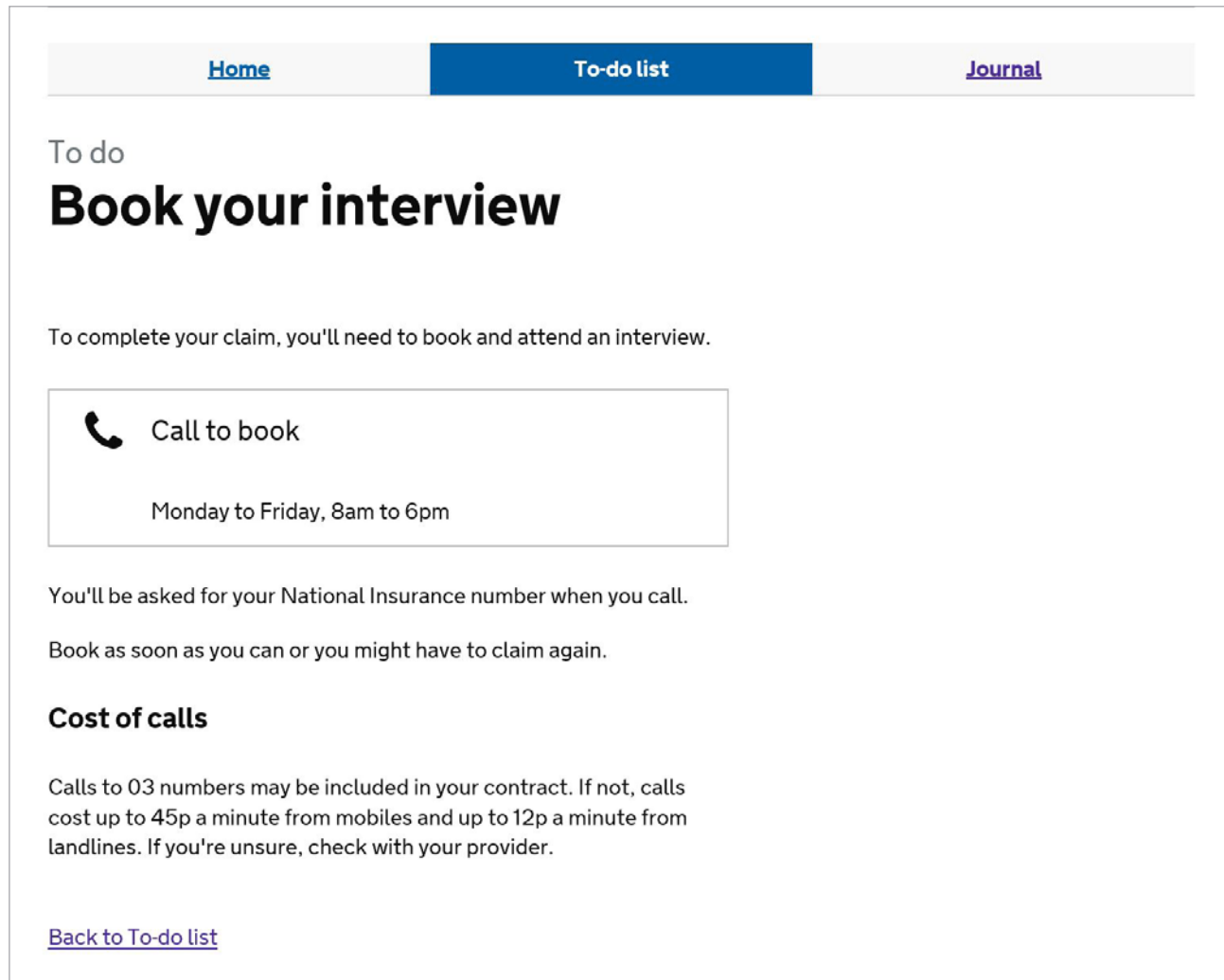
[▼ I can't do this online](#)

You'll need to [book an ID interview](#) at a jobcentre.

If you select 'I can't do this online', the next few screens will tell you what identity documents you need to verify your identity

in the office. You will be advised to make an appointment at your local JobCentre/Jobs & Benefits office.

By clicking the **Book your interview** link you will be given the following information:



The screenshot shows a navigation bar with three tabs: 'Home', 'To-do list', and 'Journal'. The 'To-do list' tab is active. Below the navigation bar, the text 'To do' is followed by the heading 'Book your interview'. A sub-heading reads 'To complete your claim, you'll need to book and attend an interview.' Below this is a call-to-action box containing a telephone icon, the text 'Call to book', and the hours 'Monday to Friday, 8am to 6pm'. Further down, there are two paragraphs of text: 'You'll be asked for your National Insurance number when you call.' and 'Book as soon as you can or you might have to claim again.' This is followed by a section titled 'Cost of calls' with a paragraph explaining that calls to 03 numbers may be included in a contract, with costs up to 45p per minute from mobiles and 12p per minute from landlines. At the bottom of the screenshot is a link that says 'Back to To-do list'.

During your interview you will be given a 16 digit Personal Security Number. Take a note of this number as you will need it to access your account in future.



## Step 5

# Maintaining your Universal Credit claim

If you have a To Do to complete you'll be notified by text or email, depending on how you asked us to contact you, to prompt you to log in. An example could be that you need to provide a copy of your CV. When you log

in you will see a To Do from your Work Coach asking for this and you will be able to upload the document or image adding any additional comments and then complete the To Do.

## Sign in

Sign in to your account using the username and password you chose when you created your account.

### Sign in to your Universal Credit account

**Username**

**Password**

Sign in

[▶ Problems signing in?](#)

**Don't have an online account?**

You may be able to use the [Universal Credit online service](#) to:

- make a new claim
- switch your existing Universal Credit account online
- join your partner's Universal Credit claim

**Used GOV.UK Verify to confirm your identity?**

If you have an online Universal Credit account, you can also [sign in with GOV.UK Verify](#)

You will then be asked to enter four of the numbers from your Personal Security Number.

If your Personal Security Number has not been issued you will instead be asked one of the security questions you selected when you created your account.



## Confirm your identity

### Enter numbers from your personal security number

1st 2nd                      10th                      16th  
  \*\*      \* \* \* \* \*      \*  \*\*      \* \* \* \*

[▶ What is a PSN?](#)

[Next](#)

[Request a new PSN](#)

[Back](#)



# Your Home Page

The screenshot shows the Universal Credit Home Page. At the top, there is a navigation bar with three tabs: 'Home' (highlighted in blue), 'To-do list', and 'Journal'. Below the navigation bar, there are four main action buttons arranged in a 2x2 grid: 'Report a change of circumstances', 'Add a note to your journal', 'View to-do list', and 'Guide'. Below these buttons, there is a section titled 'Your commitments' with the following text:

**Your commitments**

This is what you've agreed to do in order to receive Universal Credit.

**It's important that you understand that in return for your Universal Credit payment you're agreeing to look for work.**

You'll need to commit to doing everything you reasonably can to find and take paid work. Your work coach will help you agree your commitments.

Only when your claim has been submitted does your home page become available and each home page is different for each individual. You can report changes of circumstances online and can also view your To Do lists and journal. If you're reporting a change of circumstance that does not have an option online, then you can report it using the journal.

You'll also be able to view your monthly statement online too. This breaks down your payments so you'll understand why you're being paid a certain amount and shows you each piece of information, each deduction and any penalties that you may have.

In some cases you will be able to make a start on your Commitment before meeting your Work Coach. It will ask you about what work you can do, previous experience and what you will be doing to find work or earn more. This will help you and your Work Coach understand what needs to happen next.

Your journal keeps a history of the actions throughout the lifetime of your account. Each time a To Do is completed it is moved to the journal.

Some To Dos can be reviewed such as claim submissions, any additional information, upload a document or any conversations that you have ongoing with a member of staff.

You can also add notes to your journal about your work search or other activities that you are doing to help improve your circumstances such as careers advice or getting support to help you manage your money.

If the note is important or you'd like to ask a direct question, then there is a tick box to alert a member of staff to that action underneath. Once your note is saved, a notification is sent to the staff member looking after your claim to let them know you have saved a message in your account that requires attention.

# Further Information

There is information on all aspects of Welfare Changes and Universal Credit available at [www.nidirect.gov.uk/welfarechanges](http://www.nidirect.gov.uk/welfarechanges)



Northern Ireland  
Executive

[www.northernireland.gov.uk](http://www.northernireland.gov.uk)

