

Energy Company Obligation (ECO2t)

Guidance note

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Guidance note: the help to heat group

documents to be made available on request

About this guidance note

This document aims to assist suppliers and the supply chain in evidencing help to heat group (HTHG) eligibility. It shows the requirements for the different HTHG benefits, and which parts of each benefit letter can be used as evidence of eligibility. HTHG eligibility is specified in the ECO2 Order.^{1,2}

Although we provide some ways of proving HTHG eligibility, the scenarios are not exhaustive.

This document reflects the ECO2 Order and is correct based on our knowledge at this time. It is a supplier's responsibility to ensure that documents submitted to us as evidence of eligibility are in line with the requirements of the ECO2 Order and the ECO2t Guidance: Delivery.

This guidance note, and any references to ECO eligibility, are only relevant for measures installed from 1 April 2017. For measures installed prior to this date please refer to our [Affordable Warmth Group guidance note](#).

For any more help and queries about the HTHG, please contact the ECO team at eco@ofgem.gov.uk.

¹ Any further references to the ECO2 Order are references to the ECO2 Order as amended by the Electricity and Gas (Energy Company Obligation) (Amendment) Order 2017.

² Article 16A(7), and schedule 4B of the ECO2 Order.

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Introduction

This guidance note provides information that supports the existing [ECO2t Guidance: Delivery](#). Under the ECO2 extension period, Home Heating Cost Reduction Obligation measures can be delivered through three different eligibility routes; flexible eligibility, social housing E, F and G, and the help to heat group. This guidance note only provides information on the documents that can be used to demonstrate Help to heat group eligibility.

Each chapter covers a specific qualifying benefit and outlines which documents should be made available on request. It also highlights the relevant wording on different benefit letters to show help to heat group (HTHG) eligibility. The chapters include frequently asked questions specific to those benefits.

The guidance note includes other frequently asked questions that aim to answer more general queries around eligibility. We also provide guidance on redacting information, outlining what information is and isn't relevant to us when evidencing HTHG eligibility. Appendix 1 shows example letters with highlighted parts that prove HTHG eligibility or show that a customer is not eligible.

This guidance note focuses on:

- What to consider when submitting documents to us
- What documents need to be made available to us on request
- What needs to be visible on benefit letters to show eligibility
- Frequently asked questions, and
- How to redact information.

Top tips throughout the guidance note highlight the key common errors to avoid when checking the documents for HTHG status. They are provided as a memo and should be read in context with the rest of the document.

The help to heat group

The Home Heating Cost Reduction Obligation (HHCRO) focuses on low income and vulnerable householders. Householders who receive specific benefits and, for tax credits and universal credits, are below a certain income threshold are referred to as the “help to heat group” (HTHG).

Under this eligibility route, a supplier can promote a measure to occupants of private domestic premises³ that:

- A. are members of the help to heat group, or
- B. live in the same home as a member of the Help to heat group.

There are several things to consider when collecting evidence for HTHG eligibility:

- Suppliers must ensure the measure being installed is at private domestic premises where a HTHG member lives and there are appropriate letters to evidence this
- Suppliers must ensure benefit letters are from official departments/organisations
- Suppliers must ensure relevant information is clearly visible
- Suppliers must ensure all documents showing HTHG eligibility are dated within 18 months before the completion of the measure.

These requirements do not apply where suppliers submit matched ESAS or DWP data matching service reference numbers to evidence HTHG eligibility.

How to prove a member of the help to heat group lives at premises

You must be able to provide evidence that the HTHG member lives at the premises⁴ where the measure is being installed. In most cases, this will be the benefit letter.

Where the benefit letter is not addressed to the premises the measure will be installed, further evidence showing that the HTHG member lives there will be required.

You can do this by showing us any official documents⁵ addressed to that person at the address where the measure is to be installed, such as:

- a council tax letter or a letter from the council
- a utility bill, a phone bill or TV licence
- a mortgage statement or a bank statement or an extract from the electoral or open register
- any other official documentation as agreed with us.

All pieces of evidence need to be dated within 18 months before the completion of the measure.

³ [https://www.ofgem.gov.uk/publications-and-updates/eco2-guidance-note-private-domestic-premisesarticle 16A\(7\)](https://www.ofgem.gov.uk/publications-and-updates/eco2-guidance-note-private-domestic-premisesarticle%2016A(7))

⁴ Where we refer to ‘premises’ in this document, we mean private domestic premises in line with the HTHG requirements.

⁵ These documents do not have to be the original copies.

ESAS

Suppliers can submit a matched seven-digit Energy Saving Advice Service (ESAS) reference number as evidence of HTHG eligibility. These reference numbers are provided directly to suppliers by ESAS. Suppliers can provide this as part of any Ofgem audit of HHCRO measures without any other documents to demonstrate eligibility for the HTHG.

However, ESAS provide both matched and unverified reference numbers to suppliers. Only matched referrals will be accepted as evidence of eligibility, as only in these cases has the Department for Work and Pensions (DWP) confirmed that a person is receiving an HTHG benefit.

Although measures installed from 1 April 2017 must meet the new HTHG benefits criteria, a supplier can verify eligibility through ESAS prior to this date where the service provides early verification.

ESAS reference numbers that are unverified will not satisfy us that someone is a member of the HTHG. In these cases the supplier must be able to evidence HTHG eligibility by another method and should not include the ESAS reference number when notifying us of the measure.

DWP data matching

Suppliers or members of the supply chain may arrange a contract with the Energy Saving Trust (the data-matching service provider), who have a contract with DWP, to confirm that a person is a member of the HTHG.

Suppliers can submit a matched seven or 10-digit DWP data matching reference number as evidence of HTHG eligibility.

However, as with the ESAS referral service, the EST provides both matched and unverified reference numbers to service users. Only matched referrals will be accepted as evidence of eligibility, as only in these cases has the DWP confirmed that a person is receiving an HTHG benefit.

Recipients of Universal Credit (UC) can be on either the full service or the live service. Note that at the time of publication, UC full service users will not be able to be data matched. This document outlines alternative means of evidencing eligibility for full service users.

Although measures installed from 1 April 2017 must meet the new help to heat benefits criteria⁶, a supplier can verify eligibility through DWP data-matching prior to this date where the service provides early verification.

Evidence of help to heat group benefits

Where DWP data matching or ESAS verification is not used, only official HMRC, DWP/Jobcentre Plus, Pensions Service and HM Government documents are acceptable. This includes online confirmations from government departments, such as the HMRC online service and the Universal Credit full service. We also allow bank statements to prove receipt of Child Benefit. Use of any other documents must be agreed with us in writing before the installation of any measures.

⁶ Schedule 4B, of the ECO2 Order.

Relevant information

We do not require full 'proof of benefit' letters or award notices. To evidence HTHG eligibility, we only need the page(s) that show:

- that the person receives the relevant benefit(s)
- where applicable - their relevant income
- the address of the premises
- the person's name
- the letterhead from HMRC, DWP/Jobcentre Plus, HM Government or the Pension Service
- the date of the letter or the date when the benefit starts or finishes.

Dates

To prove HTHG eligibility, benefit letters must show that the person was receiving a qualifying benefit within 18 months before the completion of the measure. If the documents are older, suppliers must be able to provide updated evidence.

We will usually take 'dated' to be the date the letter was sent. Sometimes this may not correspond with the date the benefits started, in which case:

- A. If the benefit letter is sent before the benefit starts, we will accept the letter from that date if the person will receive the benefit at some point within 18 months before the completion of the measure, or
- B. If the benefit letter confirms the end of entitlement, it can only evidence HTHG eligibility when the end date of the award falls within 18 months before the completion of the measure.

Online services are available for tax credits and UC recipients which provide customers' up-to-date benefit entitlement information.

Outline of qualifying benefits

A person living in a private domestic premises is a member of the help to heat group if they receive one of the following benefits:

- **Income-related Employment and Support Allowance**
- **Income-based Jobseeker's Allowance**
- **Income Support**
- **Pension Guarantee Credit**

OR

- **Tax credits**

On the condition that the household's relevant income⁷ does not exceed the amount set out in the rows corresponding to the type of claim and the number of children or qualifying young persons.

Type of claim	Number of children or qualifying young persons for whom the claimant is responsible				
	0	1	2	3	4 or more
Single claim	£13,200	£17,400	£21,600	£25,800	£30,000
Joint claim	£19,800	£24,000	£28,200	£32,400	£36,600

OR

- **Universal Credit**

On the condition that the household's relevant monthly income in any of the preceding 12 assessment periods does not exceed the amount set out in the rows corresponding to the type of claim and the number of children or qualifying young persons.

Type of claim	Number of children or qualifying young persons for whom the claimant is responsible				
	0	1	2	3	4 or more
Single claim	£1,100	£1,450	£1,800	£2,150	£2,500
Joint claimant	£1,650	£2,000	£2,350	£2,700	£3,050

⁷ Part 1 of the Tax Credits Act 2002.

Tax Credits

Tax Credits include Working Tax Credits (WTC) and Child Tax Credits (CTC). Award notices are issued by HMRC when a person claims WTC or CTC. They are reissued annually (called "annual review award notices") and can be amended at any point, ("amended award notice"). Customers can also receive confirmation of their benefits from the HMRC online service⁸.

The award of a credit is based on an assessment of relevant income. This is calculated by HMRC and should appear on the award notices. The CTC part of an award notice may be used as evidence of responsibility for a child or qualifying young person.

Who is eligible under ECO?

Recipient of tax credits are eligible under ECO on the condition that the household's relevant income does not exceed the amount set out in the rows corresponding to the type of claim and the number of child or qualifying young person (the household composition).

Type of claim	Number of children or qualifying young persons for whom the claimant is responsible				
	0	1	2	3	4 or more
Single claim	£13,200	£17,400	£21,600	£25,800	£30,000
Joint claim	£19,800	£24,000	£28,200	£32,400	£36,600

The following documents should be made available on request (as relevant):

One of the following dated within 18 months before the completion of the ECO measure:

1.
 - A. An HMRC Child Tax Credit, Working Tax Credit, or Tax Credit award notice showing receipt of a Tax Credit and that they have a relevant income that does not exceed the appropriate income threshold for that household composition.
 - B. A DWP/Jobcentre Plus 'proof of benefit' letter showing that they receive a Tax Credit and that they have a relevant income that does not exceed the appropriate income threshold for the household composition.
 - C. A confirmation from the HMRC online service showing that they receive a Tax Credit and that they have a relevant income that does not exceed the appropriate income threshold for the household composition. For the rest of the chapter HMRC online notifications are included in references to award notifications.

In cases where the benefit letter is dated within 18 months and does not show relevant income, it must be accompanied by the most recent benefit letter that does show the relevant income.

⁸ <https://www.gov.uk/log-in-register-hmrc-online-services/sign-in>

- Where appropriate, a Child Tax Credit or Child Benefit award notice is evidence of a responsibility of children or qualifying young persons. No further evidence will be required. Receipt of Child Tax Credit should also appear on the document evidencing Working Tax Credit. In some cases suppliers may have other documents that are evidence of responsibility for a child or qualifying young person.⁹
- An HMRC Child Tax Credit, Working Tax Credit, or Tax Credit award notice notification confirming whether the benefit claim is a single or joint claim.

What is required on the letter for the purposes of ECO?

The table below states the expected wording on the relevant HMRC letters. The statements may vary slightly between letters.

See Appendix 1 for example letters.

Relevant income	
Working Tax Credit /Tax Credit/Child Tax Credit award notice	<p>This can be found in the 'Other help you may get' or 'Personal circumstances' sections:</p> <p><i>'The income we have used to calculate your Tax Credits is £xx,xxx.xx'</i></p>
Responsibility for a child or qualifying young person	
Child Tax Credit/Tax Credit award notice	<p>A CTC or a Tax Credit award notice stating receipt of CTC can be used as evidence of a child or a qualifying young person.</p> <p>You may also find the below wording in the person circumstances section of the award notice:</p> <p><i>'Qualifying children and young persons 'x aged under 16'</i></p> <p>For more information on determining the number of children or qualifying young persons the claimant is responsible for refer to our FAQs for Tax Credits.</p>
Child Benefit award notice	A Child Benefit award notice which states the name of the parents
Joint or Single Claim	
Working Tax Credit/Tax Credit/Child Tax Credit award notice	<p>Where this is a joint claim, the award notices will be addressed to two people. It will also reference on the first page the individuals involved in the claim.</p> <p>See the FAQ on 'Do I look at the individual's income or the household income?' for more information</p>

⁹ Further information is available in 'Other frequently asked questions'.

Frequently asked questions

Children and qualifying young persons

How to confirm responsibility for children and qualifying young persons?

Responsibility for a child or qualifying young person is defined in regulation 3 of the Child Tax Regulations 2002. Generally, a person shall be treated as responsible for a child or qualifying young person who is normally living with them.

If in receipt of Child Tax Credit (CTC) this is evidence of responsibility for at least one child or qualifying young person. If in receipt of a Tax Credit award notice, or amended or annual review award notice (ie not a CTC), the 'Personal circumstances' section may state that the customer is responsible for a child or qualifying young person.

To know the number of children or qualifying young persons the claimant is responsible for go to the 'Personal circumstances' or the 'How we work out your Tax Credits' sections of the Tax Credit award notice:

Qualifying children and young people
1 aged under 16

The individual children and young people may also be listed. For example, you may see:

Qualifying Children and young people
John Smith
Date of birth: 28/04/2013

This section will often state the date of birth of the children and qualifying young people but this information is not necessary for the purposes of ECO.

Other ways of proving responsibility for a child or qualifying young person can be found in 'Other Frequently Asked Questions'.

Relevant income

There are multiple incomes stated in the letter. Which do I use?

The different incomes may be for separate tax years. However, only one of these is used as evidence to calculate the Tax Credit award; this is the relevant income. It's shown in the 'Other help you may get' section. It may say: 'The income we have used to calculate your tax credits is £xxxx.xx'.

Where the 'Other help you may get' section does not state an income, then you should look at the 'Income' section. Please refer to the Appendix for some examples.

It could look like this:

Other help you may get:

Receiving tax credits may mean you can get other benefits that are not provided by us.

For more information, please phone the Helpline.

The information below may help you apply.

The income we have used to calculate your tax credits is £15035.00.

There are different tax years. Which tax year do I use?

You can use either tax year, as long as the relevant income does not exceed the appropriate income for the household composition and the dates you are using are within 18 months before the completion of the measure.

The document must state the income used to calculate the award of that Tax Credit for that tax period. The letter may state: 'The income we have used to calculate your tax credits is £xx,xxx.xx'. Please refer to the Appendix for some examples.

Do I look at the individual's income or the household income?

If a couple has claimed Tax Credit jointly, then you must look at the aggregate income of the household. The aggregate income must not exceed the appropriate income for the household composition.

For example, the cover page of the Tax Credit award notice may say:

Tax Credits award for 06/04/2016 to 05/06/2014

MR JOHN SMITH **National Insurance number ABC1234E**

MRS JANE SMITH **National Insurance number ABC1234E**

Or the following in the 'Personal circumstances' section of the Tax Credit award notice:

MR JOHN SMITH

You work 50 hours a week.

MISS JANE SMITH

You claimed tax credits jointly with the person named above.

What if the award notice only states that the customer is on Income Support or another benefit and does not show an income?

If the document does not state the relevant income but confirms receipt of Income Support or another benefit, then the customer is not eligible under this route.

In this scenario the customer should claim under the route of receiving Income Support or another qualifying benefit.

For Employment and Support Allowance and Jobseeker's Allowance the 'proof of benefit' letter will need to state whether the benefit is income or contribution-based. Recipients of 'New style' JSA are also ineligible as this works in the same way contribution-based ESA. For the purposes of ECO, the benefit must be income-based.

Pension Guarantee Credit

Who is eligible?

State Pension Credit is an income-related benefit made up of two parts: Guarantee Credit and Savings Credit. **Only Guarantee Credit¹⁰ is eligible under ECO.** Some householders may also be in receipt of Savings Credit, but they will only be eligible for ECO if they are in receipt of Guarantee Credit. Guarantee Credit State Pension is **not** the same as Guarantee Credit.

Guarantee Credit tops up a weekly income if it is below a certain level. Savings Credit is an extra payment for people who have saved towards their pension. The amount people receive depends on their circumstances.

Letters for matched (and deceased matched) WHD Core Group recipients can be used as evidence of HTHG eligibility. The Warm Home Discount (WHD) Core Group receives a set discount from their electricity bill. This is **not** the same as a Cold Weather Payment or Winter Fuel Payment.

Letters are sent annually between September and March telling people whether they will receive the discount automatically (if they match the requirements) or must apply for it (if their situation is unverified). These are distinguished by different letters at the start of their reference numbers: 'M' matched, 'U' unmatched, 'DU' deceased unmatched or 'DM' deceased matched.

The following documents should be made available upon request:

One of the following documents dated within 18 months before the completion of the measure:

- Pension Credit award notice or 'proof of benefit' letter from DWP/Jobcentre Plus/The Pension Service confirming receipt of State Pension Credit
- OR
- Warm Home Discount (WHD) core group 'matched' notice from HM Government. The reference number on this notice should start with 'M' or 'DM'.

What is required on the letter for the purposes of ECO?

This table shows the expected wording on the relevant letters from **DWP/Jobcentre Plus/Pensions Service/HM Government letters**. The statements may vary slightly between letters.

Please see Appendix 1 for example letters.

Pension Guarantee Credit	
Pension Credit award, amendment or annual review award notice or 'proof of benefit' letter from the Pensions Service/DWP/Jobcentre Plus	To ensure that this is a guarantee credit, and not state pension, the letter should include: 'Pension Guarantee Credit of £xxx.xx per week'
WHD Core Group 'matched' Notice	A letter with a reference number beginning with M or DM indicates a matched notice. It may include the following text:

¹⁰ Article 16A(7)(d), paragraph 1(d), schedule 4B, and sections 1 and 2 of the State Pensions Credit Act 2002.

'You meet the scheme conditions and will receive £xxx.xx towards your electricity costs'

Or

'Information held by the Department for Work and Pensions (DWP) shows that you qualify for a discount of £xxx.xx to help with electricity costs'.

It is not sufficient to provide a letter from HM Government saying the customer '...may be entitled to £xxx.xx towards your electricity costs'.

Frequently asked questions

Is the customer eligible if they receive State Pension?

No, State Pension is not acceptable.

Is the customer eligible if they are either guarantee credit or savings credit?

No. They must be in receipt of guarantee credit to be eligible. However, those in receipt of both Pension Credit Guarantee Credit and Pension Credit Savings Credit are also eligible.

Income-related Employment and Support Allowance Income-based Jobseeker's Allowance Income Support

Who is eligible?

Income Support

People can receive Income Support if they have low or no income, work fewer than 16 hours a week and have not signed on as unemployed. They will receive a basic payment and additional payments called 'premiums'. People receiving Income Support will not be receiving Jobseeker's Allowance or Employment and Support Allowance.

Income-related Employment and Support Allowance (ESA)

People can receive this if they are ill or disabled. It may provide support if they are unable to work or need personalised help at work if they are able to work. How much people get depends on their circumstances. There are two types of ESA: income-related and contribution-based.

If a person has contributed enough national insurance in a preceding period then they will receive contribution-based ESA. This is not eligible for the HTHG.

If a person has not contributed enough national insurance or is on a low income they may receive income-related ESA. This is eligible for the HTHG.

Income-based Jobseeker's Allowance (JSA)

People can receive JSA if they are over 18 and able to work. How much people get depends on their circumstances. There are two types of JSA: income-based and contribution-based.

If a person has contributed enough national insurance in a preceding period then they will receive contribution-based JSA. This is not eligible for the HTHG. Recipients of 'New style' JSA are also ineligible as this works in the same way contribution-based ESA

If a person has not contributed enough national insurance they may receive income-based JSA. This is eligible for the HTHG.

All benefit types

Benefits can be issued by DWP/Jobcentre Plus at any point in the year when a person claims. They can be amended at any point. Award notices that are issued by HMRC are reissued annually (called "annual review award notices"), can be amended at any point ("amended award notice") and can be provisional award notices. Where we refer to award notices, this can include any of the above.

The following documents should be made available upon request:

One of the following documents dated within 18 months before the completion of the ECO measure:

- 'Proof of benefit' letter from DWP/Jobcentre Plus confirming receipt of one of the benefits mentioned above

OR

- A Tax Credit, Working Tax Credit or Child Tax Credit award notice confirming receipt of one of the benefits mentioned above.

You can use CTC or Tax Credit award notices to evidence Income-related ESA, Income-based JSA, or Income Support. The statements may vary slightly between letters.

Please see Appendix 1 for relevant example letters.

Income-related ESA, Income-based JSA, IS	
Child Tax Credit or Tax Credit award, amended award or annual review award notice	<p>This can be found in the 'How we work out your Tax Credits' section:</p> <p><i>'You receive Income-related Employment and Support Allowance'</i></p> <p><i>'You receive Income-based Jobseeker's Allowance'</i></p> <p><i>'You receive Income Support'.</i></p>

Frequently asked questions

What is the difference between income and contribution-based ESA?

ESA is split into income-related and contribution based. Only income-related ESA is eligible.

The customer will usually get income-related ESA if they are on a low income or have not made enough National Insurance contributions.

They will usually get contribution-based ESA if they have paid enough National Insurance contributions.

In a joint claim, if one individual receives income-related ESA and the other contribution-based, they would still be eligible because there is income-related ESA within the claim.

What if the letter confirms receipt of both income and contribution based ESA?

Some 'proof of benefit' letters will state two incomes where they receive income-related ESA, but are also entitled to contribution-based ESA.

A customer's eligibility is set by whichever of the two is higher. For example, where they receive an income-related amount of £106 and a contribution-related amount of £110, they will not be eligible for the HTHG. On the other hand, if in receipt of an income-related amount of £110 and a contribution related amount of £106, they will be eligible.

Where the two incomes are the same, they will not qualify: they will be classified as receiving contribution-based ESA.

Universal Credit

Universal Credit (UC) is a single monthly payment for people in or out of work. It replaces:

- Income-based Jobseeker's Allowance
- Housing Benefit
- Working Tax Credit
- Child Tax Credit
- Income-related Employment and Support Allowance, and
- Income Support.

A customer could either be part of the Universal Credit full service, or the live service. The full service is available to all types of claimants in certain areas of Great Britain. Full service customers will have an online Universal Credit account to manage their claim.

Universal Credit live service is available to all single people across Great Britain, who are not in a full service area. It is also available to couples and families with children who live in one of the areas within the list of jobcentre areas where couples and families can claim Universal Credit.¹¹

Live service claims will eventually move to the full service.

Who is eligible under ECO?

Recipients of Universal Credit are eligible under ECO on the condition that the household's relevant income in any of the preceding 12 assessment periods does not exceed the amount set out in the rows corresponding to the type of claim and the number of children or qualifying young persons (the household composition).

Type of claim	Number of children or qualifying young person for whom the claimant is responsible				
	0	1	2	3	4 or more
Single claimant	£1,100	£1,450	£1,800	£2,150	£2,500
Joint claimant	£1,650	£2,000	£2,350	£2,700	£3,050

The following documents should be made available upon request:

Evidence of the following criteria from a Universal Credit award notification:

1. Confirmation of receipt of Universal Credit (UC) through a DWP/Jobcentre Plus letter, or UC live service award notification or UC full service statement. This should show that the recipient had a monthly earned income that does not exceed the appropriate income threshold for the household composition in any one of the 12 months before the point when they are assessed as eligible for the HTHG.
2. Where appropriate, confirmation from a UC live service award notification, a UC full service statement, a child tax credit, or a child benefit letter confirming the number of children or qualifying young persons the benefit recipient has responsibility for.
3. Universal Credit live service award notification or UC full service statement whether the benefit claim is a single or joint claim.

¹¹ Further information on the Universal Credit and the difference types of services can be found at <https://www.gov.uk/guidance/universal-credit-full-service-and-live-service>

THE UC full service recipients have an online account. A printed copy or a screenshot can be provided to the supplier to use as evidence.

The UC live service users can be data matched using the DWP data matching service. At the time of publication UC Full service recipients cannot be data matched. Formatting should be checked prior to printing or saving the online statement to ensure the document is legible.

What is required on the letter for the purposes of ECO?

The table below states the expected wording if using a **Universal Credit award notification/service statement** or **DWP/Jobcentre Plus 'proof of benefit'** letter to evidence qualifying elements. The statements may vary slightly between letters.

See Appendix 1 for example letters.

Net monthly income	
Universal Credit Live Service Award Notification	This can be found in section 3: 'Then we take account of your take-home pay': 'Your take-home pay for this period is £xxx.xx'.
Universal Credit Full Service Statement	'Your take-home pay for this period is £xxx.xx'.
Responsibility for a child or qualifying young person	
Universal Credit Live Service Award Notification	The award will list the children or qualifying young persons on the claim 'Children on your claim <forename middle name surname> <forename middle name surname> (NB repeats for each child)
Universal Credit Full Service Statement	'You said that you have x children'
Child Benefit Award Notice	A Child Benefit award notice which states the name of the parents Or A bank statement evidencing receipt of Child Benefit: The Child Benefit number starts with 'CHB' and is made up of 8 numbers and 2 letters, eg CHB12345678 AB ¹²

¹² Further guidance on how to evidence Child Benefit can be found at <https://www.gov.uk/>.

Joint or Single Claim

Universal Credit Live Service Award Notification

Universal Credit Full Service Statement

The award notice will not explicitly state where the claim is single or joint. This can however be determined by the standard allowance amount for that claim. See the FAQs for UC for more information.

For further information on evidencing responsibility for a child or qualifying young person, please see 'Other Frequently Asked Questions'.

Frequently asked questions

Do I need to prove that the relevant income did not exceed the appropriate income threshold for the household income for the past 12 months?

No. You do not need to prove the customer's earned income has consistently been under the threshold for 12 months. Where one award notice issued in the past 12 months shows the earned income did not exceed the appropriate income threshold, this is sufficient evidence. Section 3 of the Universal Credit award notification should show the relevant information (take home pay).

Please see the Appendix for an example letter.

The customer may only receive one award notice per year. How do they evidence that their monthly earned income did not exceed the appropriate income threshold?

DWP may not provide frequent updates to the customer. DWP will provide an updated letter where someone's entitlement to certain benefits changes, however no letter will be provided where their income changes. As a result, where their income is changed from being over to under appropriate income threshold, the customer can go to their local Jobcentre Plus and they may be able to provide a 'proof of benefit' letter that reflects their new circumstances.

How can I prove responsibility of a child or a qualifying young person?

Responsibility for a child or qualifying young person is defined in Regulation 4 of the Universal Credit Regulations 2013. A person is responsible for a child or qualifying young person who normally lives with them.

How can I prove if a claim is a single or joint claim?

The award notice may not explicitly state where the claim is single or joint. This can however be determined by the standard allowance amount for that claim. See the table below:

Type of claim	Standard monthly payment ¹³
Single claim under 25	£251.77
Single claim 25 or over	£317.82
Joint claim both persons under 25	£395.2
Joint claim one or both persons 25 or over	£498.89

¹³ Note that these are the 2018/18 amounts and are subject to future change. To keep up to date with the payment amounts see <https://www.gov.uk/government/publications/proposed-benefit-and-pension-rates-2017-to-2018>.

Other frequently asked questions

How can a customer confirm HTHG eligibility?

Households in England and Wales should first contact the Energy Saving Advice Service (ESAS), an independent helpline set up by the Energy Saving Trust on behalf of the government.¹⁴ The service runs a data check with the Department for Work and Pensions (DWP) to confirm eligibility against the benefit criteria. Eligible customers may be referred on to an obligated supplier. Suppliers have signed up to offer a minimum package of assistance, within agreed timeframes, for customers which they receive through this route.

The ESAS helpline is available on 0300 123 1234 and on the [Energy Saving Trust website](#).

What can the customer do if ESAS say they are not eligible but they think they are?

ESAS check with DWP directly to confirm people's eligibility for the HTHG against the qualifying benefit criteria. The customer should double-check their benefit letters and compare them with the online eligibility tool at <https://www.gov.uk/>. If the individual still believes they are eligible, they should call ESAS again to discuss this.

Tenant or landlord: who is the main beneficiary?

HTHG eligibility is based on the tenant's status rather than the landlord's. This is because in most cases, the person who pays the energy bill is usually the tenant, which means that they would see the benefits of any bill savings created by the installation of the measures. It will also be the tenant who risks harm by living in the cold, and who, after the installation of the measures, will take advantage of living in a potentially warmer home.

Is someone responsible for a child or qualifying young person if fostering a child through a council?

No, because the child's accommodation or maintenance is borne by local authority funds.

They are also not a responsible for a child for the purposes of ECO if they are being looked after by a local authority¹⁵, and that authority has placed them in the home of someone proposing to adopt them.

Is a birth certificate enough to evidence responsibility for a child or qualifying young person?

No, as the parent may no longer be responsible for that child (eg if parents have divorced or separated, and the child lives with one parent).

The HTHG member's benefit letter is addressed to another person / power of attorney. However, the HTHG member's name is in the actual benefit letter. Do I need to provide any additional evidence?

Yes. You need to also provide evidence that the HTHG member resides at the premises. See the introduction for a list of official documents that can be used to demonstrate this.

¹⁴ The Energy Saving Trust no longer provides an ECO customer referral service in Scotland. However, it continues to provide energy saving advice for Scottish customers.

¹⁵ For Tax Credit Recipients see, Article 3, paragraph 2.2 (Rule 4) of the Child Tax Credit Regulations 2002. For Universal Credit Recipients see Article 4(6) of the Universal Credit Regulations.

How else can I evidence responsibility for children or qualifying young persons?

If not in receipt of the forms of evidence outlined in this document, you could provide one of the following:

A copy of a 'proof of benefit' letter stating that you receive:

- disabled child premium
- family premium, or
- family premium (lone parent).

You can also use a letter dated within 18 months before the completion of the measure with the following information stated clearly on headed paper:

- child or young person's name
- child or young person's age or date of birth
- claimant's address
- confirmation that the child or young person lives with named parent or guardian at the mentioned address.
- for young persons aged 16 and over or for those under 20, confirmation that the child is in full-time education or in training as per Part 1 of the Child Tax Credit Regulations 2002.¹⁶

This letter will be accepted as proof of being responsible for a child or qualifying young person if it comes from one of following health, education, local authority and support services professionals:

- Child and Adolescent Mental Health Services (CAMHS)
- teacher
- social services worker
- health visitor
- support worker
- physio-, speech and language, or occupational therapist
- GP
- probation officer
- consultant paediatrician
- community nurse
- NHS Continuing Health Care professional.

The letter must include the professional's name, title and contact details. We may consider other professionals appropriate, but this must be agreed in writing before installing a measure.

¹⁶ <http://www.legislation.gov.uk/uksi/2002/2007/contents/made>

Guidance on redacting information

The document(s) that should be made available to us on request should contain a minimum amount of information to prove eligibility under the HTHG. This would be a letter-headed document that states the customer's name and address, and shows receipt of the qualifying benefit(s). It is not necessary to provide the entire document, only the relevant pages.

Letters that include other pieces of personal information not relevant to ECO should be redacted. What can be redacted depends on the customer's HTHG qualification route. Consider the following when submitting documents to us:

- The amount the customer receives from their benefit. You only need to show that they receive that benefit.
- For HTHG routes which are not means tested (eg Income Support or State Pension Credit), you do not need to show the customer's income or savings.
- National Insurance numbers should not be visible. These are often shown on the front page, and should not be used as a unique identifier.
- Bank account number and other irrelevant information when using bank statements as proof of Child Benefit.

When processing any personal data or sensitive personal data, suppliers are reminded of their duties to comply with the requirements of the Data Protection Act 1998, and the General Data Protection Regulation, ("GDPR") (when in force).¹⁷

We may need to audit suppliers' compliance with their legislative requirements up to and after the end of the scheme. Suppliers must ensure that they retain information up to the 31 March 2019. It is the suppliers' responsibility to keep up to date with any changes of requirements.

¹⁷ In particular note: data protection principle 3 "Personal data shall be adequate, relevant and not excessive in relation to the purpose or purposes for which they are processed; data protection principle 5," "Personal data processed for any purpose shall not be kept for longer than is necessary for that purpose or those purposes.", and the corresponding provisions of the GDPR.

Appendix 1 – Example letters

These are some examples of different types of letters that you may encounter.

We indicate whether or not the documents are suitable to evidence HTHG eligibility. We have highlighted certain parts of these documents that need to be considered when determining eligibility.

This is non-exhaustive list of the eligible benefits or scenarios for HTHG eligibility. This is a sample to be used to demonstrate some of the letters that may be provided.


For further clarification about whether or not a document is eligible, please contact the ECO team at Ofgem on eco@ofgem.gov.uk

Example letters

- A. Child Tax Credit/Working Tax Credit: award notice
- B. Child Tax Credit/Working Tax Credit: annual review award notice
- C. Income-based Jobseeker's Allowance (JSA): 'proof of benefit' letter
- D. Income Support: 'proof of benefit' letter
- E. Warm Home Discount (WHD) Core Group notice: 'Matched'
- F. Warm Home Discount (WHD) Core Group notice: 'Unmatched'
- G. Warm Home Discount (WHD) Core Group notice: 'Deceased Matched (deceased recipient)'
- H. Warm Home Discount (WHD) Core Group notice: 'Deceased Unmatched (deceased recipient)'
- I. The Pension Service: 'proof of benefit' letter
- J. Universal Credit live service award notification
- K. Universal Credit full service statement

Example A: Child Tax Credit/Working Tax Credit: Award notice (3 pages)

This document shows a joint claim of WTC, CTC with the claimants responsible for two children. The relevant income below the £28,200 threshold set for the household composition.



Helpline 0345 300 3900
Minicom/Textphone 0345 300 3909
 For our opening hours go to
www.hmrc.gov.uk or phone us.

MR JONATHAN SMITH
 MRS JANE SMITH
 1 EXAMPLE STREET
 CAMBRIDGESHIRE
 CA1 AAA

TCO Liverpool 3
 TCO
 GOVERNMENT BUILDING
 PRESTON
 LANCASHIRE
 PR1 0YP
 Date 28 November 2016

Tax credits award for 06/04/2013 to 05/04/2014

MR JONATHAN SMITH
 MRS JANE SMITH

National Insurance Number AB 12 34 56 C
 National Insurance Number AB 12 34 56 D

Summary

Tax credit for the period - see Part 2

Working Tax Credit	£4038.80
Child Tax Credit	£5993.30

Amounts still to be paid to you for the period shown above - see Part 3

Working Tax Credit to MISS JANE SMITH	£3140.79
Child Tax Credit MISS JANE SMITH	£4853.28

Tax credits are based on your personal circumstances and income for the whole tax year. After the end of the tax year, when all the information is known, we make a final decision about how much you are entitled to receive.

Part 1 shows your circumstances, including your income. Please check this part and tell us immediately if anything is wrong, missing or has changed.

Part 2 is for information. It shows how we calculate your tax credits

Part 3 gives details about any payments will make for the period shown above.

Your rights and obligations

Your Charter explains what you can expect from us and what we expect from you. For more information go to www.hmrc.gov.uk/charter

Why we are writing to you

Thank you for the information you gave us about your tax credits claim. This award notice gives details of your tax credits award for the period 06/04/2016 to 05/04/2017.

Page 1 of 8

Name and address must be clear and match where measure was installed

Joint claim

Date within 18 months before completion of the measure

Receipt of qualifying benefit

Joint claim

What to do now

Please check the details on this award notice and tell us if anything is wrong, missing or incomplete.

If your payments have gone down

If you cannot meet your essential living expenses because your payments have gone down, please contact us. We may be able to make extra payments.

Other help you may get

Receiving tax credits may mean you can get other benefits that are not provided by us. For more information, please phone the Helpline.

The information below may help you apply.

The income we have used to calculate your tax credits is £8000.00

Relevant income

Part 1 Personal circumstances

Your tax credits are based on your personal circumstances. We hold the following details on 16/06/2016. Please tell us immediately if anything is wrong, missing or incomplete because if you receive more money than you are entitled to, you will have to pay the money back.

Claimants

Your tax credits are based on you being part of a couple. If you have separated, please tell us. You may be able to make a new claim to tax credits, either on your own or as part of a new couple.

Tax credits take account of the hours you work. We need to know whether you work

- less than 16 hours a week
- between 16 - 23 hours a week
- between 24 - 29 hours a week
- 30 hours a week or more.

Tell us if your hours change so you move from one of the above groups into another. For couples with children it is your joint working hours that count, but one particular partner must work at least 16 hours a week.

MR JOHNATHAN SMITH

You work 50 hours a week.

MRS JANE SMITH

You claimed tax credits jointly with the person named above.

Number of children or qualifying young persons

Qualifying children and young people

2 aged under sixteen

Childcare costs

You have no qualifying childcare costs. If you start to pay for childcare and you qualify for Working tax Credit you may be able to claim the childcare element of Working Tax Credit. Contact us for details.



Tax credits award for 06/04/2016 to 05/04/2017

MR JONATHAN SMITH
MRS JANE SMITH

National Insurance Number AB 12 34 56 C
National Insurance Number AB 12 34 56 D

Continued

Income

This is the information we have about your income. Please contact us immediately if it is not correct.

Your income for the year 6 April 2016 to 5 April 2017

This income is based on an estimate provided by you. Please tell us your actual income as soon as you know what it was.

Names of joint claimants

MR JONATHAN SMITH
Income from self-employment
Your total income

£8000.00

MRS JANE SMITH
Total income for the year from 6 April 2016 to 5 April 2017

Relevant aggregate income for this tax year
£8000.00
£8000.00

Has your income changes?

Please tell us if your income goes up or down. This helps us to keep your payments on the right track.

Income gone down? - tell us now, you may be due more tax credits

If you are due more tax credits, we will increase your remaining payments straight away. After 5 April 2017 we will send you a Renewal Pack. Once you have told us your actual income for the year from 6 April 2016 to 5 April 2017, we will check your whole award. If we owe you any money we will pay it.

Income gone up? - tell us now to keep your payments on the right track


This does not usually affect your tax credits payments for this year. They will stay the same until 5 April 2017 as long as there are no other changes in your income or circumstances.

From 6 April 2017 your payments will be based on income of £8232.00. If your income is more and you do not tell us until you complete your Renewal Pack, you may be paid too much from 6 April 2017 onwards. If you are overpaid, we will reduce your payments to collect back any overpaid amount.

Relevant income from this tax year

Thank you for the information you gave us about your tax credits claim. This award notice gives details of your tax credits award for the period 06/04/2016 to 05/04/2017.

Example B: Child Tax Credit/Working Tax Credit: Annual review award notice (2 pages)
 This document does not contain the claimant's relevant income. However, it shows receipt of Income Support.



MR JONATHAN SMITH
 1 EXAMPLE STREET
 CAMBRIDGESHIRE
 CA1 AAA

Helpline 0345 300 3900
Minicom/Textphone 0345 300 3909
 For our opening hours go to
www.hmrc.gov.uk or phone us.

TCO Liverpool 3
 TCO
 GOVERNMENT B
 PRESTION
 LANCASHIRE
 PR1 0YP

Date 25/04/2016

Check before 31/07/2016

Please keep this for your records

Tax credits - Annual Review for year ended 05/04/2017
Your tax credits award for 06/04/2016 to 05/04/2017

Dates of when the person was receiving benefit

Single claim

MR JONATHAN SMITH

National Insurance Number AB 12 34 56

We told you that we would be contacting you to review your tax credits award. We want to:

- make sure we paid you the correct amount for the award period shown above, and
- ask you to make a tax credits claim for 2016-2017.

We need you to review your personal circumstances during the whole award period shown above and check if you received any income.

If you need to tell us about anything once you have completed your Annual Review, **please phone us straight away.** if you do not have anything to tell us you need to do nothing more and you will not receive another notice from us this year. This *TC603R Tax Credits Annual Review* is also your Award Notice and the amount of your award is shown below.

We will decide on 31/07/2017 that:

- The final amount of your tax credits award for the period 06/04/2016 to 05/04/2017 is £8880.45.
- Your tax credits award for 2016-2017 will be as shown in the Payments section.

If later, you think those decisions are wrong, you will have 30 days from 31/07/2017 to appeal.
 If you do not think something is wrong, you do not have to wait until then to contact us.

Changes that could affect you
 Tax credits will gradually be replaced by a new Universal Credit by 2017. For more information go to www.gov.uk/uc.

Step A

Check your personal circumstances at the start of your award period were correct and complete

The notes tell you what to look for when you are checking and who can get extra amounts of tax credits.

At the start of your award period, 06/04/2016:

You claimed tax as an individual

MR JONATHAN SMITH

Date of birth: 01/01/1984

Lived in the United Kingdom

Received Income Support

Qualifying benefit

Your qualifying children and young people

JOSEPH SMITH

Date of birth: 01/01/2005

Received disability Living Allowance or personal Independence Payment, or was registered blind (or was taken off the register in the 26 weeks before your claim).

JULIA SMITH

Date of birth: 01/01/2009

Your childcare costs - childcare providers must be registered or approved, see the Notes. You had no qualifying childcare costs.

Step B

Check that the changes in your personal circumstances listed below, are correct and complete

The notes tell you the changes in your personal circumstances that may affect your award.

You have not told us about any changes in your personal circumstances that may have affected your award. The information we held throughout the award period from 06/04/2016 to 05/04/2017 is as shown in Step A.

Example C: Income-based Jobseeker's Allowance: 'proof of benefit' letter (1 page)
This document shows receipt of income-based JSA.

Jobseeker's Allowance

01234

MR JONATHAN SMITH
1 EXAMPLE STREET
CAMBRIDGESHIRE
CA1 AAA

**Your reference is AB123456C
Please tell us this number
if you get in touch with us**

**Birkenhead Benefit Centre
Jobcentre Plus
Jupiter Drive
Chester
CH70 8BP**

Phone 0845 6088529
TEXTPHONE for the deaf/hard of hearing ONLY 0845 6088551

Date 23 May 2016

Dear Mr Smith

YOUR CLAIM FOR JOBSEEKER'S ALLOWANCE

I am pleased to tell you that we can pay you Jobseeker's Allowance from 21 May 2016. You will get £102.70 a week. We have used the tax years ending 5 April 2015 and 5 April 2016 to assess your claim.

If you are claiming for a partner

Your partner may be required to take part in a Work Focused interview with a Personal Advisor once you have been claiming benefit for more than 26 weeks. Your partner will be notified if they are required to attend.

The attached sheet shows how we worked this out. If you want more information please get in touch with us. Our phone number and address are at the top of this letter.

This assessment is based on how much the law says you need to live on. You have not paid, or been credited with, enough Class 1 National Insurance Contributions for them to be used in this assessment.

HOW YOU WILL GET YOUR MONEY

Your money will be paid every two weeks while you are still entitled to Jobseeker's Allowance.

Bank/Building society: Post Office (TM)
Post office card account

We also hold your account number/sort code but for security reasons they have not been included in this letter.

We will pay your Jobseeker's Allowance into the above account.

PAYMENT TO YOUR BANK/BUILDING SOCIETY

These notes are about allowance payments into a bank or building society account. Please make sure you read them.

Page 01 of 04

Example D: Income Support: 'proof of benefit' letter (1 page)

This document shows receipt of Income Support (see below).

The image shows a letter from Jobcentre Plus. It includes contact information, a recipient address, and a table of contact details. The letter body contains sections for 'About your Income Support', 'How to get your money', and 'What you should do if your circumstances change'. Callouts highlight specific details: the recipient's name and address, the date of the letter, and the fact that the letter does not state the recipient receives income support.

jobcentreplus
Website: www.jobcentreplus.gov.uk

Name and address must be clear and match where measure was installed

Mrs J Smith
1 Example Street
Cambridgeshire
CA1 AAA

If you get in touch with us, tell us this reference number AB123456C

Our address Walsall Benefit Centre
Post Handling Site B
Wolverhampton
WV99 1

Our phone number 0345 608

If you have a textphone 0845 6088

Date 7 July 2016

Date within 18 months before completion of the measure

Dear Mrs Smith

It does not say here they receive income support. See rest of letter

About your Income Support

I am writing to tell you that your recent change in circumstances does not affect the amount of Income Support we pay you, however there may be future changes in your entitlement.

This may be because of future changes you have told us about, the uprating of benefit or changes in deductions from your benefit.

This means you will continue to get £244.89 a week.

The way this has been worked out is shown on the page called **How your Income Support was worked out**.

How to get your money

We will pay your Income Support into the account that you have told us you wish to use. The money will be in the account requested every fortnight by the day Income Support is due.

If you want a further explanation of this decision, please see the final page of this letter. it explains what to do if you disagree with this decision.

What you should do if your circumstances change

If your circumstances change, it may affect the amount of benefit you get. You must tell us about any changes in your circumstances.

Yours sincerely

Ms
Manager

Example E: Example H: Warm Home Discount (WHD) Core Group notice: 'Matched' (1 page)
This document shows Warm Home Discount (WHD) Core Group notice: 'Matched'. This is eligible for the HTHG. (1 page)

Name and address must be clear and match where measure was installed

Mr J Smith
1 Example Street
Cambridgeshire
CA1 AAA

HM Government

Reference number:
M112233445

'M' means 'matched'

£140 help with your electricity costs

Dear Mr Smith

It's always a nice surprise when you find out you are getting a little extra help with your bills. The Government has teamed up with energy suppliers to help older people with their energy costs through the Warm Home Discount Scheme Core Group.

This help is automatic. You do not need to claim it.

We have checked the information held by the Department for Work and Pensions (DWP) and your electricity supplier. You meet all of the scheme conditions and will receive £140 towards your electricity costs.

What happens next

You do not need to do anything. Your electricity company will automatically apply the discount to your electricity account by 31 December 2016. This will be shown as a Warm Home Discount on your bill.

There is some more information on the back of this letter to answer any questions you may have.

Yours sincerely

HM Government
working in partnership with your energy supplier

Ensure the letter is about WHD Core Group

queries:

Go online at www.gov.uk/the-warm-home-discount-scheme or call the helpline on 0845 603 9439 from 8:30am to 4:30pm Monday to Friday

If you have speech or hearing difficulties call textphone 0845 606 0285


Call charges
Calls to 0845 numbers from BT land lines should cost no more than 4p a minute with a 15p call setup charge. You may have to pay more if you use another phone company or a mobile phone, or if you call from abroad.

Textphones
Our textphone numbers are for people who cannot speak or hear clearly. If you don't have a textphone, you could check if your local library or citizens advice bureau has one. Textphone don't receive text messages from mobile phones.

Confirms receipt of WHD

Example I: Warm Home Discount (WHD) Core Group notice: 'Unmatched' (1 page)
 This document shows Warm Home Discount (WHD) Core Group notice: 'Unmatched'. Not acceptable as proof of eligibility.

Name and address must be clear and match where measure was installed



Warm Home Discount Team,
 Pink Zone, 1st Floor, Peel Park
 Brunel Way, Blackpool, FY4 5ES

Reference number:
 U11223344

'U' means
 'unmatched'

Don't miss out on £140 help with your electricity costs - Call by 14 March 2017

Dear Mr Smith

You may be entitled to £140 towards your electricity costs this winter. The Government has teamed up with energy suppliers to help some older people with their energy costs through the Warm Home Discount Scheme Core Group.

Information held by the Department for Work and Pensions (DWP) shows that you may be eligible for this scheme.

What to do next
 If you or your partner are named on your electricity bill call the Warm Home Discount Scheme Helpline on 0800 917 1003. When you call **you must have:**

- a copy of this letter, and
- your electricity bill or statement.

You must call before 14 March 2017 or you will not get the discount.

The Helpline will tell you if you can get the £140. They will then pass your details to your electricity supplier who will apply the discount.

There is some more information on the back of this letter to answer any questions you may have.

Yours sincerely

HM Government
 working in partnership with your energy supplier

Warm Home Discount Scheme information

Go online at www.gov.uk/the-warm-home-discount-scheme

Does not confirm receipt of WHD. Not eligible for the HTHG

0845 606 0285


Call charges
 Calls to 0800 numbers are free from BT land lines but you may have to pay if you use another phone, or if you are calling from abroad.

Textphones
 Our textphone numbers are for people who cannot speak or hear clearly. If you don't have a textphone, you could check if your local library or citizens advice bureau has one. Textphone don't receive text messages from mobile phones.

Ensure the letter is about WHD Core Group

Example J: Warm Home Discount (WHD) Core Group notice: 'Deceased Matched (deceased recipient)' (1 page).

This document shows Warm Home Discount (WHD) Core Group notice: 'Deceased Matched (deceased recipient)'. This is eligible for the HTHG.

Keep Warm  Keep Well

HM Government

Reference number:
DM112233445

'DM' means
'deceased
match'

Name and address must be clear and match where measure was installed

£140 Discount from electricity suppliers

Dear Mr Smith

Information held by the Department for Work and Pensions (DWP) shows that you qualified for a discount of £140 to help with electricity costs through the Warm Home Discount Scheme Core Group. We are writing to let you know how the discount will be made.

This discount is automatic. You do not need to claim it.

We have checked the information held by the Department for Work and Pensions and the electricity supplier. The eligibility conditions have been met as your partner was getting the relevant Pension Credit on the qualifying date of 20 July 2016. The £140 discount will be made to the electricity account.

What happens next

Your electricity supplier will automatically apply the discount to your electricity account by 31 December 2016. This will be shown as a Warm Home Discount on the bill.

There is some more information on the back of this letter to answer any questions you may have.

Yours sincerely

**HM Government
working in partnership with energy suppliers**

Warm Home Discount Scheme information

You don't need to call us to claim this discount. For any queries:

Go online at www.gov.uk/the-warm-home-discount-scheme

or call the helpline on **0845 603 9439** from 8:30am to 4:30pm Monday to Friday

If you have speech or hearing difficulties call textphone **0845 606 0285**

Call charges

Calls to 0845 numbers from BT land lines should cost no more than 4p a minute with a 15p call setup charge. You may have to pay more if you use another phone company or a mobile phone, or if you call from abroad.

Textphones

Our textphone numbers are for people who cannot speak or hear clearly. If you don't have a textphone, you could check if your local library or citizens advice bureau has one. Textphone don't receive text messages from mobile phones.

Ensure the letter is about WHD Core Group

Confirms receipt of WHD

Example H: Warm Home Discount (WHD) Core Group notice: 'Deceased Unmatched (deceased recipient)' (1 page)

This document shows Warm Home Discount (WHD) Core Group notice: 'Deceased Unmatched (deceased recipient)'. Not acceptable as proof of eligibility.

Keep Warm Keep Well

HM Government

Mr Jonathan Smith
1 Example Street
Cambridgeshire
CA1 AAA

WHDS, PP18, 1st Floor,
West Wing, Peel Park,
Brunel Way, Blackpool,
FY4 5ES

Reference number:
DU112233445

'DU' means
'deceased
unmatched'

£140 Rebate from electricity suppliers

Dear Mr Smith

Information held by the Department for Work and Pensions (DWP) shows that you may be entitled to £140 towards electricity costs this winter through the Warm Home Discount Scheme Core Group are your partner was getting the relevant Pension Credit on the qualifying date of 20 July 2016.

We are writing to explain how you could still get the discount

What to do next
If you (or your partner) were named on the electricity bill call the Warm Home Discount Scheme Helpline on 0800 917 1003. When you call you must have:

- a copy of this letter, and
- an electricity bill or statement

You must call before 14 March 2017 or you will not get the discount.

Once the Helpline has taken information they will confirm whether you could get a discount. They will then pass the details to the relevant electricity supplier who will apply the discount.

There is some more information on the back of this letter to answer any questions you may have.

Yours sincerely

HM Government
working in partnership with energy suppliers

Go online at
www.gov.uk/the-warm-home-discount-scheme
or call the helpline on
0800 917 1003
from 8:30am to 4:30pm
Monday to Friday

If you have speech or hearing difficulties call textphone
0845 606 0285

Call charges
Calls to 0800 numbers are free from BT land lines but you may have to pay if you use another phone company, a mobile phone, or if you are calling from abroad.

Textphones
Our textphone numbers are for people who cannot speak or hear clearly. If you don't have a textphone, you could check if your local library or citizens advice bureau has one. Textphone don't receive text messages from mobile phones.


Name and address must be clear and match where measure was installed

Does not confirm receipt of WHD. Not eligible for the HTHG

Example I: The Pensions Service 'proof of benefit' letter (2 pages)

This document shows receipt of Pension Savings Credit, not Pension Guarantee Credit. This claimant would not be eligible under the help to heat group criteria.

Name and address must be clear and match where measure was installed



Website: www.thepensionsservice.gov.uk

Mrs Jane Smith
1 Example Street
Cambridgeshire
CA1 AAA

If you get in touch with us, tell us this reference number **AB123456789**

Our address **The Pension Service
PO Box 19013
Motherwell
ML1 3**

Our phone number **0845 6**

If you have a textphone **0845 60 265**

Date **31 December 2016**

Date within 18 months before completion of the measure

Dear Mrs S

This letter is for your information. Please retain it as evidence of Pension Credit entitlement for the following people:

Mrs Jane Smith

This is about the Pension Credit you will receive from April 2017.

Confirms receipt of Pension Credit

From April the rates of some benefits may change.

Your Pension Credit will be £2.81 from 8 April 2017. The Pension Service will pay you £2.81 a week.

Not in receipt of guarantee credit

Your Pension Credit award consists only of the savings credit. Although you have not been awarded the guarantee credit, you may still be able to get help with health benefits to cover things like dental treatment. If you want to know more about this, ask us for leaflet **HC11** *Are you entitled to help with health costs?* and form **HC1** *Help with health costs*.

Other Benefits

You will be contacted separately about any increased to other benefits you receive. These letters are issued over a number of weeks so do not worry if you do not receive one immediately or if your friends or neighbours have already received theirs.

Your Assessed Income Period

You have an Assessed Income Period from 15 August 2016 to 14 August 2017. During this time you do not need to tell us if there is a change in your Retirement Income. Enclosed is the leaflet INF4(PC) which has a section about the Assessed Income Period. Reading this leaflet should answer any questions you may have.

Housing Benefit or Council Tax Benefit

If you receive **Housing benefit/Council Tax Benefit** you still have to report to your Local Authority any changes to Savings/Capital if the amount ever exceeds £16,000.

For customers who reside in **Northern Ireland** and are in the receipt of **Housing Benefit**, any changes to Savings/Capital resulting in the amount exceeding £16,000, must still be reported to the Northern Ireland Housing Executive/Land and Premises Service.

Example J: Universal Credit live award notification (2 pages)

This document shows how to identify the relevant income and the child and qualifying young person components (see below).

SG_01_(V1.0)_UC Decision next payment confirmation

Building/Office location
Office Type
Street
Town
County
Postcode

Name and address must be clear and match where measure was installed

Mr Jonathon Smith
1 Example Street
Cambridgeshire
CA1 AAA

www.gov.uk/universalcredit

Telephone: 0845 6000 723
Textphone: 0845 6000 743

If you contact us, use this reference:
<NINO>
<NSG date>

Confirms receipt of Universal Credit

Dear Mr J Smith

Your Universal Credit monthly payment is £<xxx.xx>

This will be paid on <next payment date>. You'll receive this amount each month unless your circumstances change.

The amount may have changed since the last payment calculation we sent you. This can happen if:

- we've received new information about your circumstances or earnings
- sanctions or other deductions have been applied

The table below explains how we worked out your payment. If you need more information, contact us using the phone number or address at the top of this letter.

To keep receiving Universal Credit you must do all the things set out in your Claimant Commitment.

If your circumstances change, you must tell us straight away by phoning 0845 6000 723. If any changes affect your Universal Credit, we'll write and let you know.

Because you receive Universal Credit you may be eligible for other benefits. For more information about this, please go to www.gov.uk/universalcredit

Yours Sincerely
Office Manager

Universal Credit is operated by the Department for Work and Pensions.

www.gov.uk/universalcredit

Page 1 of 3

Standard allowance confirms whether this is a single or joint claim

How your Universal Credit payments are worked out

This is based on your circumstances between <start date of assessment period> and <end date of assessment period>

1. First, we bring together the basic parts of Universal Credit that apply to you.	
Standard allowance for you	£xxx.xx
Housing element	£xxx.xx
Child element <this is based on x children>	£xxx.xx
Disabled child element	£xxx.xx
Childcare element	£xxx.xx
Carer element	£xxx.xx
Limited Capability for Work element	£xxx.xx
Amount	£xxx.xx
2. Next, we take account of any non-work income and other benefits you receive, as well as your savings and capital	
<type of income> £xxx.xx. Income from £xxx.xx savings and capital. We take £1.00 into account for every £250 you have over £6000.	£xxx.xx £xxx.xx
The total we take off for these items is:	£xxx.xx
3. Then we take account of your take-home pay	
Take-home pay is what's left after tax, National Insurance contributions have been deducted. Your take-home pay for this period is £xxx.xx The first £xx.xx of your take-home pay doesn't affect your monthly amount. Every £1.00 you earn in take-home pay over this £xx.xx reduces your Universal Credit by 65 pence.	£xxx.xx
The total we take off for take-home pay is:	£xxx.xx
4. Lastly, we take account of any loans, advances, sanctions, penalties, deductions, overpayments or third party payments you have.	
<reason for deduction>	£xxx.xx
The total we take off for these items is:	£xxx.xx
Total adjustments	£xxx.xx
Your Universal Credit monthly payment for this period	£xxx.xx



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Example K: Universal Credit full service statement (2 pages)

This document shows example of what the Universal Credit full service with a single claimant responsible for three children. The monthly earned income is less than the £1,250 applicable for that household composition (see below).

Your payment this month is

£706

This will be paid by 8pm on 14 April 2017

Must be dated within
18 months prior to the
completion of the measure

How we calculate your payment

Your payment is based on what you've told us and covers the period between

08
MAR

and

07
APR

It is important to tell Universal Credit immediately about any changes in your circumstances that could affect your Universal Credit payments.

[Report a change in my circumstances](#)

Standard allowance <small>You receive a standard Universal Credit allowance each month</small>	£317.82	Standard allowance of £317.82 confirms this is a single claim for somebody over 25
Housing <small>You said that your rent is £600.00 per month</small>	£600.00	
Children <small>You said that you have 3 children</small>	£740.42	Number of children or qualifying young persons
Disabled children <small>You said that you have 2 disabled children</small>	£735.84	
Carer <small>You said that you're caring for 1 adult(s)</small>	£150.39	
Total before adjustments	£2,544.47	

Take-home pay

Take-home pay is what's left after tax, National Insurance and any pension contributions have been deducted

Pay you've reported £400.00

Your total take-home pay for this period is £400.00

The first £192.00 of your take-home pay doesn't affect your Universal Credit monthly amount. Every £1.00 you earn in take-home pay over this amount reduces your Universal Credit by 65 pence.

The total we take off for take-home pay is **£135.20**

Relevant monthly income

Other income

We take into account other income that you have, such as pensions, and educational grants.

The total we take off for other income is **£10.00**

Other benefits

An average of other benefits that you're continuing to claim.

Jobseeker's Allowance **£86.67**

The total we take off for other benefits is **£86.67**

Savings and Investments

We make a deduction for any savings, investments and capital that you have if they are over £6000.

The total we take off for savings investments and capital is **£4.35**

Total adjustments

We have adjusted your payment based on the details you gave us. This includes adjustments for any income you receive which is not take-home pay as well as adjustments for any capital you may have.

If you need help with this, please call 0345 600 4272.

Total adjustments **£836.22**