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Annual Report by the Department for Communities on the Social Fund

2022/23

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Preface

The Social Fund is a regulated scheme made up of Sure Start Maternity Grants, Funeral Expenses Payments, Child Funeral Fund Payments, Cold Weather Payments and Winter Fuel Payments, and a discretionary scheme of Budgeting Loans.

These payments provide vital financial support for people in need by helping people and families on low incomes with certain one-off or occasional expenses as well as providing a source of affordable credit for the financially excluded.

In 2022/23, the Social Fund continued to help people on low incomes through both the regulated and discretionary schemes.

Over 55,000 Budgeting Loans were awarded totalling £30.864 million.

A total of 2,066 Sure Start Maternity Grants were awarded, totalling £1.064 million to families to help meet the costs associated with a new baby.

Awards amounting to £3.228 million were granted under the Funeral Expenses Payment scheme.

Awards amounting to £409,504 were granted under the Child Funeral Fund scheme, which was introduced on 1 June 2022 and is not a means-tested payment.

In addition, the Fund also helped with fuel costs, with Winter Fuel Payments contributing to heating costs to 298,378 pensioners totalling £122 million.

Awards amounting to £2.571 million were made under the Cold Weather Payments scheme.

Colum Boyle

Permanent Secretary
Department for Communities

1. Introduction

- 1.1 This is the thirty fifth annual report on the operation of the Social Fund, and it is laid before the Northern Ireland Assembly in accordance with section 146(5) and (6) of the Social Security Administration (Northern Ireland) Act 1992.
- 1.2 There are two categories of Social Fund: the regulated scheme made up of Maternity Grants, Funeral Expenses Payments, Child Funeral Fund Payments, Cold Weather Payments, and Winter Fuel Payments; and the discretionary scheme comprised of Budgeting Loans that are intended to respond flexibly to meet exceptional and intermittent needs.

Source of data for this report

- 1.3 The figures in this report, unless stated otherwise, are taken from the Department's Social Fund Policy, Budget and Management Information System and from scans of the Social Fund Computer System¹. Together these data sources record details of every individual application, subsequent payment decision and any outstanding repayment record and provide useful comparative data for various purposes such as average awards, what needs they cover and how various client groups are using the Social Fund. These comparisons are shown in the annexes to this report.
- 1.4 The figures in this report, unless otherwise stated, do not include clerical cases that have not yet been built onto the Social Fund Computer System.

¹ There is also a statutory requirement to produce a Social Fund White Paper Account. Current arrangements are that this is laid in the Northern Ireland Assembly separately.

2. The Regulated Social Fund

Sure Start Maternity Grant

- 2.1 The Sure Start Maternity Grant (SSMG) is a payment of £500 to provide important help for families with the costs of a new baby (or babies in the event of a multiple birth) if there are no other children under 16 in the claimant's family. The grant is available to recipients, and partners of recipients, of a qualifying benefit or tax credit. For claims in 2022/23 these are: Income Support; income-related Employment and Support Allowance; income-based Jobseeker's Allowance; Pension Credit; Child Tax Credit (at a rate higher than the family element); or Working Tax Credit (which includes a disability or a severe disability element) and Universal Credit. It is also possible to qualify if in receipt of a Support for Mortgage Interest Loan.
- 2.2 Sure Start Maternity Grants are also available for the additional children of subsequent multiple births. This recognises that help is needed with the costs for all but one of the additional children of a subsequent multiple birth. An example would be where the birth of twins follows a previous single birth, a SSMG can now be paid to help with costs of the additional child. In some instances, other children can be disregarded if the claimant has a formal or informal caring arrangement for them before the birth of their first child.

- 2.3 In 2022/23, 2,066 awards were made worth £1.064 million.
- 2.4 Sure Start Maternity Grant statistics are in Annexes 1, 2 and 7.

Funeral Expenses Payment

- 2.5 The Funeral Expenses Payment (FEP) scheme continues to provide help towards a simple, respectful, low-cost funeral. Payments are made to a person responsible for funeral costs who is in receipt of (or whose partner is in receipt of) a qualifying benefit or tax credit. In 2022/23 the qualifying benefits and tax credits are the same as for the Sure Start Maternity Grant (see paragraph 2.1 above), but with the addition of Housing Benefit. Any payments made by the Department for Communities towards funeral costs are recoverable from the estate of the deceased if there are sufficient funds.
- 2.6 In 2022/23, 2,223 awards were made worth £3.228 million.
- 2.7 The Bereavement Service has continued to provide a means of claiming a Funeral Expenses Payment by telephone for people in receipt of income-related benefits, reporting the death of a relative or friend. Funeral Expenses Payment claims may also be made by completing and submitting the written Funeral Expenses Payment claim form.

- 2.8 Funeral Expenses Payment statistics are in Annexes 1, 2 and 7.

Child Funeral Fund

- 2.9 The Child Funeral Fund (CFF) was a new scheme introduced in Northern Ireland on 1 June 2022. The CFF provides a one-off lump sum payment of £3,056 to cover the expense of a funeral after the death of a child under the age of 18, or stillborn after the 24th week of pregnancy. The payments are tax free and do not affect entitlement to social security benefits. The CFF is available regardless of the income of the claimant but is dependent on certain criteria.
- 2.10 The CFF claimant must have accepted responsibility for the funeral costs. The child must not have reached their 18th Birthday at the time of their death or must have been stillborn after the 24th week of pregnancy. The funeral must have taken place in Northern Ireland on or after 1 June 2022. The claim must be made within 6 months of the funeral. The £3,056 payment can be made to the responsible person, to the funeral director, or split between the two.

2.11 In 2022/23, 134 awards were made worth £409,504. £311,711 was paid directly to claimants, and the remaining £97,793 was paid to funeral directors. It should be noted that this figure comprises only 10 months from when the scheme was introduced and is unlikely to be reflective of the future figures for full years of the scheme.

- 2.12 Child Funeral Fund statistics are in Annex 5.

Cold Weather Payment

- 2.13 A Cold Weather Payment provides help with additional costs of heating during periods of severe weather. The scheme runs from 1 November to 31 March each year. Every residential postcode in Northern Ireland is linked to one of the weather stations used in the scheme. A payment of £25 is made when the average temperature has been recorded as, or is forecast to be, 0°C or below over seven consecutive days at the weather station linked to the person's postcode.

2.14 In 2022/23, eligible recipients of a Cold Weather Payment were:

Table 1 – Qualifying Conditions for a Cold Weather Payment

Benefit in Payment	Qualifying Conditions for a Cold Weather Payment
Pension Credit	Entitled to Cold Weather Payment (CWP).
Income Support (IS)	Entitled to a CWP if they receive a disability premium, a severe disability premium, any one of the pensioner premiums, a child disability premium within IS or Child Tax Credit (CTC) or they have a child under 5 years.
Income-related Employment and Support Allowance (ESA(IR))	Entitled to a CWP if they receive the support component, the work-related activity component, a severe or enhanced disability premium, pensioner premium, or have a child who is disabled for whom they receive a disability premium within CTC or have a child under 5 years.
Universal Credit Qualifying conditions	Entitled to a CWP under Universal Credit if they are: <ul style="list-style-type: none">• not employed or self-employed; AND• they, or their partner, receive a limited capability for work element (with or without a work-related activity element); or• they receive the disabled child element within their assessment; or• have a child under 5 years. Universal credit recipients who are employed or self-employed will only be eligible for CWPs if they have a disabled child or eligible young person in the family.

2.15 In 2022/23, there were 102,602 Cold Weather Payment awards totalling £2.571 million, as the weather conditions for payment of these were met.

2.16 Cold Weather Payment statistics are in Annex 1.

Winter Fuel Payment

2.17 Winter Fuel Payments help older people to meet heating costs. They are tax free and do not affect entitlement to social security benefits.

2.18 In total 298,378 people benefited from a Winter Fuel Payment in 2022/23. The total spent in 2022/23 on Winter Fuel Payments was £122 million.

2.19 Households with someone who had reached State Pension age for women and aged up to 79 received between £250 and £500, households with someone aged 80 or over received between £300 and £600. It should be noted that in response to the rising cost of living, the WFP amount was temporarily increased for Winter 2022/23, and will also be temporarily increased for Winter 2023/24.

2.20 Most people who had reached the State Pension age for women and who were normally living in Northern Ireland were eligible for the Winter Fuel Payment. People do not receive a payment if during the qualifying week they:

- were in prison
- were in hospital receiving free treatment for more than 52 weeks
- needed permission to enter the UK and do not qualify for help from the Department

- have been living in a care home for the previous twelve weeks or more and receive Pension Credit, income related Jobseeker's Allowance or income-related Employment and Support Allowance.

2.21 The qualifying age for Winter Fuel Payments for men and women is increasing in line with the overall increase in State Pension Age.

2.22 Winter Fuel Payments are paid to people residing in most European Economic Area countries or Switzerland as long as they have a genuine and sufficient link with the UK. The qualifying week for winter 2022/23 payments was the week beginning 19 September 2022.

2.23 The countries where Winter Fuel Payments are no longer payable are Cyprus, Greece, France, Gibraltar, Malta, Portugal, and Spain.

2.24 The majority of payments were made automatically before Christmas 2022 without the need to claim. However, newly eligible people needed to make a claim if they were not receiving a social security benefit (or receiving only Housing Benefit or Child Benefit) during the qualifying week.

2.25 The Department for Work and Pensions administers and manages Winter Fuel Payments in relation to eligible customers in Northern Ireland.

3. The Discretionary Social Fund

Budgeting Loans

- 3.1 Budgeting Loans are interest free loans which are repayable from benefit awards. They help people, who have been in receipt of a qualifying benefit for at least six months, with intermittent expenses for which it is difficult to budget for. The qualifying benefits are Income Support; income-related Employment and Support Allowance; income-based Jobseeker's Allowance; and Pension Credit.
- 3.2 In 2022/23, a total of 55,523 awards were made, worth £30,864 million.
- 3.3 There is a single Budgeting Loans allocation, which is controlled and managed centrally to ensure that all Budgeting Loan applicants in the same circumstances are treated in a similar way wherever they live.

From April 2013, this budget has been funded solely from recoveries without any additional Annually Managed Expenditure allocations.

- 3.4 The Budgeting Loan scheme will remain in place for applicants in receipt of existing income-related benefits until they migrate to Universal Credit (at which point they may be eligible for a Budgeting Advance. A Budgeting Advance is not an award from the Social Fund).
- 3.5 Claimants that migrate from Universal Credit to Pension Credit will once again qualify for a Budgeting Loan.
- 3.6 Budgeting Loan statistics are in Annexes 1, 3, 4, 5 and 6.

4. General Administration

- 4.1 In 2022/23, Budgeting Loans, Budgeting Loan Reviews and Sure Start Maternity Grants were delivered by the centralised Social Fund Team in Lisburn Jobs and Benefits Office. Funeral Expenses Payments and Child Funeral Fund Payments are delivered by the Department for Communities' Bereavement Service.
- 4.2 The normal method of applying for Funeral Expenses Payments, Child Funeral Fund, Sure Start Maternity Grants and Budgeting Loans is in writing (the appropriate application forms can be downloaded or requested by post). The Bereavement Service, however, takes Funeral Expenses Payment and Child Funeral Fund claims over the telephone when a potential Funeral Expenses Payment or Child Funeral Fund recipient prefers this to making a written claim.
- 4.3 A regulated Social Fund applicant who is dissatisfied with the initial decision on their application may apply to have the decision reviewed under a mandatory reconsideration within 14 days of the original decision. Applicants who remain dissatisfied can appeal the decision.
- 4.4 A Reviewing Officer within the Department for Communities carries out the first review and the outcome is notified to the applicant. In 2022/23, 118 applications (does not include Funeral Expenses Payments) for first review were dealt with.
- 4.5 Applicants who remained dissatisfied were able to ask for a further review by the Independent Case Examiner (ICE).
- ## Reviews
- ## Clearance standards
- 4.6 Clearance times for the operational delivery of the Social Fund are monitored against a comprehensive set of clearance standards. The table below shows clearance against: The Average Actual Clearance Times (AACT) standard (column 2).

Table 2 – Clearance Standards

Average Actual Clearance Times (AACT) (working days)	AACT Standard	Achieved in 2022/23
Budgeting Loans	10	3.4
Local Review of above loans	5	0.6
Funeral Payments	20	16.49
Child Funeral Fund	20	16.21
Sure Start Maternity Grants	5	3.8

Data sourced from the Social Fund Computer System (SFCS).

The AACT achieved figures have been rounded.

5. Financial Management

Background

- 5.1 Payments from the regulated Social Fund are entitlement based and regulations prescribe the circumstances and amounts that are payable.
- 5.2 Cash-limited budgets are allocated for the Budgeting Loans, Funeral Expenses Payments, and Sure Start Maternity Grants.

Recoveries

- 5.3 The Department for Communities' Debt Management manages the recovery of Social Fund loans from most people who are no longer in receipt of a legacy benefit.
- 5.4 In 2022/23 Debt Management registered 19,031 Social Fund loan referrals.

2022/23 Discretionary Social Fund budget

- 5.5 £39.283 million (£37,812 million from Budgeting Loans, £1.471 million from Crisis Loans) was recovered through the repayment of loans.

2022/23 Regulated Social Fund budget

- 5.6 £138,000 of Funeral Expenses Payments was recovered from estates.
- 5.7 Details of recoveries are given in Annex 1 and 6.

6. Summary of Financial Performance

- 6.1 In 2022/23 the Social Fund provided payments of just over £31.928 million (£30.864 million Budgeting Loans & £1.064 million Sure Start Maternity Grants), with an additional £122 million of Winter Fuel Payments paid to 298,378 people who had reached state pension age.
- 6.2 Gross expenditure on Budgeting Loans was £30.864 million.
- 6.3 Overall during 2022/23, the Discretionary Social Fund provided help in the form of 55,523 awards. (See Annex 1)

The 2022/23 Discretionary Social Fund budget

- 6.4 Budgeting Loans budget allocated for 2022/23 was £37.031 million.
- 6.5 Loan recoveries during the year were £37.812 million against a forecast recovery of £40.080 million. Recoveries provided 100% of the funds needed to meet gross expenditure.

7. Index to Annexes

General

1. Northern Ireland Social Fund Summary Statistics

The Regulated Social Fund

2. Sure Start Maternity Grants and Funeral Expenses Payments: Awards by claimant group and Awards by qualifying benefit or tax credit

The Discretionary Social Fund

3. Budgeting Loans: gross expenditure by Applicant Group
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5. Child Funeral Fund Disallowances
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Client Groups and Applicant Groups

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Annex 1 (from PBMIS)

Nothern Ireland Social Fund Summary Statistics

	REGULATED SOCIAL FUND				DISCRETIONARY SOCIAL FUND	
	SSMG	CWP	FEP	CFF	BL	CL
Applications received	3249	n/a	2784	156	57,180	N/A
Initial decisions	3249	n/a	2780	145	57,891	0
Awards	2066	102,602	2223	134	55,523	0
Awards as % of initial decisions	63.6%	n/a	80.0%	92.4%	95.9%	0
Initial refusals	1238	n/a	579	9	1686	0
Gross expenditure £m	£1.067	£2.570	£3.229	£0.410	£30.864	£0
Recoveries £m	£0	n/a	£0.138	n/a	-£37.812	£1.471
Net expenditure £m	£1.067	£2.570	£3.091	£0.410	-£6.948	-£1.471
Average award £	£516.56	£25.05	£1452.54	£3,059.70	£555.884	£0

KEY:

SSMG = SURE START MATERNITY GRANT, CWP = COLD WEATHER PAYMENT, FEP = FUNERAL EXPENSES PAYMENT, CFF = CHILD FUNERAL FUND, BL = BUDGETING LOAN, CL – CRISIS LOAN, N/A = NOT APPLICABLE

NOTES:

1. SSMG, FEP, CFF and BL figures for Gross Expenditure and Recoveries are taken from the draft Social Fund Account 2022/23. (The DfC 2022/23 Social Fund account is currently subject to audit review and the draft expenditure and recovery amounts above could be subject to adjustment). Remaining SSMG, FEP and BL data sourced from the Policy, Budget and Management Information System.
2. CWP figures for Gross Expenditure and Net Expenditure are taken from the draft Social Fund Account 2022/23. (The DfC 2022/23 Social Fund account is currently subject to audit review and the draft expenditure amounts above could be subject to adjustment).
3. The figure for recoveries for Crisis Loans is taken from the Central Payment System (CPS).
4. Average SSMG award reflects multiple births.
5. There is no requirement to claim Cold Weather Payments.
6. The number of discretionary awards made after review is not included in the table. The draft gross expenditure figure does include awards made after review, reconsideration or appeal processed in the 2022/23 financial year.
7. For the regulated Social Fund, the method of calculating average awards is to divide draft gross expenditure by the number of awards (including those made after reconsideration or appeal).
8. For the discretionary Social Fund, the method of calculating average awards is to divide initial draft gross expenditure by the number of initial awards (excluding the value of review awards).
9. The difference between applications received, initial decisions, awards and initial refusals, is due to: applications being withdrawn; applicants rejecting or not responding to loan offers; and, not decided at the time the count was made.
10. Cold Weather Payment award figures are taken from Departmental records.
11. Child Funeral Fund award figures are taken from Departmental records.
12. Figures and percentages may not sum due to rounding.

Annex 2 (from PBMIS)

Sure Start Maternity Grants and Funeral Expenses Payment Awards by Claimant Group

Claimant Group	Sure Start Maternity Grants		Funeral Expenses Payments	
	Awards	% of Total Awards	Awards	% of Total Awards
Pensioners	0	0.00%	760	34.19%
Unemployed	1831	88.63	0	0.00%
Disabled	7	0.34%	606	27.26%
Lone Parents	3	0.15%	0	0%
Employed	5	0.24%	0	0.00%
Others	220	10.65%	857	38.55%
Total	2066	100%	2223	100%

Sure Start Maternity Grants and Funeral Expenses Payment – Awards by Qualifying Benefit or Tax Credit

Qualifying Benefit	Sure Start Maternity Grants		Funeral Payments	
	Awards	% of Total Awards	Awards	% of Total Awards
Income Support, Employment and Support Allowance (income related), Jobseeker's Allowance (income-based) and Pension Credit	1835	88.81%	2017	90.73%%
Child Tax Credit (at a rate higher than the family element)/Working Tax Credit (which includes a disability or a severe disability element)	231	11.18%	99	4.45%
Housing Benefit	0	0%	107	4.81%
Total	2066	100%	2223	100%

NOTES:

1. Claimant group definitions are in Annex 9.
2. These tables include awards made after reconsideration or appeal.
3. If an award is made to a claimant who receives more than one qualifying benefit or tax credit, then the award is recorded under the qualifying benefit or tax credit which appears first in the table above.
4. Figures and percentages may not sum due to rounding.

Annex 3 (from PBMIS)

Budgeting Loans – Gross Expenditure by Applicant Group

Applicant Group	Budgeting Loans	
	Amount £	% of Total Amount
Pensioners	£1,944,476.64	6.3%
Unemployed	£2,342,476.86	7.59%
Disabled	£6,709,505.60	21.75%
Lone Parents	£5,246,156.51	17.0%
Others	£14,608,160.74	47.35%
Total	£30,850,776.35	100%

NOTES:

1. Total Expenditure figures in this table may differ from Annex 1, as data is obtained from the Department's Social Fund Policy Budget and Management Information System (PBMIS) rather than the Social Fund Account 2022/23.
2. Applicant group definitions are in Annex 8.
3. Expenditure includes awards made on review, reconsideration or appeal.
4. Figures and percentages may not sum due to rounding.

Annex 4 (from PBMIS)

Budgeting Loans – Reason for Initial Refusal by Applicant Group

Counts

Type	Pensioners	Disabled	Lone Parents	Unemployed	Others	Total
Outstanding Social Fund debt	24	158	51	54	347	634
Not in receipt of a qualifying benefit	37	73	28	80	774	992
Not in receipt of a qualifying benefit for 26 weeks	20	8	1	1	21	51
Other	0	4	10	480	3	56
Total	81	243	81	183	1145	1733

Percentages

Type	Pensioners	Disabled	Lone Parents	Unemployed	Others	Total
Outstanding Social Fund debt	29.63%	65.02%	62.96%	29.51%	30.31%	36.58%
Not in receipt of a qualifying benefit	45.68%	30.04%	34.57%	43.72%	67.60%	57.24%
Not in receipt of a qualifying benefit for 26 weeks	24.69	3.29%	1.23%	0.55%	1.83%	2.94%
Other	0.00%	1.65	1.23%	26.23%	0.26%	3.23%
Total	100%	100%	100%	100%	100%	100%

NOTES:

1. Claimant group definitions are given in Annex 8.
2. The qualifying benefits are Income Support; income-related Employment and Support Allowance income-based Jobseeker's Allowance; Pension Credit.
3. Figures and percentages may not sum due to rounding.
4. Claimant group definitions are given in Annex 8.
5. The qualifying benefits are Income Support; income-related Employment and Support Allowance income-based Jobseeker's Allowance; Pension Credit.

Annex 5

Child Funeral Fund – Disallowances

Disallowance Reason	Figures
Funeral prior to 01/06/2022	4
Deceased Over 18	1
No Funeral or Service	2
Other	2
Withdrawals	3
Total	12

NOTES:

1. 1 application was disallowed as the applicant had not accepted responsibility for the funeral costs. The responsible person then made a separate successful application.
2. 1 application was disallowed as no part of the funeral or service had taken place in Northern Ireland. The applicant asked for a mandatory reconsideration and provided additional information, so the application was then revised and paid.
3. 1 application was made and withdrawn from an English resident, with the funeral/service having taken place in England.
4. 2 applications were withdrawn as they were duplicate paper applications submitted with a payment already being made for that bereavement.
5. Due to the nature of CFF applications, a phone call is made prior to a disallowance decision being completed to make the applicant aware that their CFF application will be disallowed, and that they will receive a disallowance notification. However, on these 3 occasions the applicants requested to withdraw their claims instead.

Annex 6

Budget Loan Recovery – Average Weekly Repayment Deductions From Income Support, Jobseeker's Allowance and Pension Credit

		Feb 2022	May 2022	Aug 2022	Nov 2022
Average deduction	IS	£21.80	£21.64	£18.30	£14.91
	JSA	£12.41	£12.52	£12.40	£12.34
	PC	£20.56	£20.93	£14.24	£10.83
Number of deductions	IS	7,620	4,880	2,300	1,040
	JSA	2,320	2,180	2,050	1,885
	PC	2,800	2,020	600	220

NOTES:

1. Data from Income Support, Jobseeker's Allowance and Pension Credit Quarterly Statistical Enquiries.
2. UC recovery data for Budgeting Loans is not available for inclusion in the 2022/23 report.

Repayment Source 2022/23 (from PBMIS)

Budgeting Loans		
	Amount £	% of Total Amount
Income Support & Pension Credit	£10,171,050.21	31.01%
Jobseeker's Allowance	£3,034,247.87	9.25%
Employment and Support Allowance	£18,098,964	55.18%
Incapacity Benefit	£0.00	0%
Other benefits	£1,044,977.08	3.19%
Cash	£448,632.98	1.37%
TOTAL	£32,798,299.53	100%

NOTES:

1. Social Fund loans are recoverable from most Social Security benefits.
2. Figures and percentages may not sum due to rounding.
3. UC recovery data for Budgeting Loans is not available for inclusion in the 2022/23 report.

Annex 7

Summary of Budgeting Loan Review Applications

First Reviews	Budgeting Loans
Number of applications for first review	120
Number of decisions revised at first review	79
Percentage of applications revised at first review	65.83%

NOTES:

1. The number of reviewing officer decisions reviewed excludes applications for Social Fund Commissioner that were outside the Inspector's jurisdiction or withdrawn.
2. Percentages have been calculated using non-rounded figures.
3. Totals may not sum due to rounding.

Annex 8

Summary of Social Fund Appeals

Type of Payment	Number of appeals	Number heard and decided at hearing	Number decided in appellant's favour
Funeral Expenses Payment	6	6	0
Sure Start Maternity Grant	3	4	0

* Additional information provided by TAS – there were 2 FP's and 4 SSMG's superseded by the Department

SOURCE:

Figures are provided by the Appeals Service NI.

NOTES:

1. The number of appeals is the number received by the Appeals Service NI.
2. Number of appeals heard and decided at hearing' may not necessarily have been received in the same financial period

Annex 9

Client Groups

Social Fund payments are wide ranging from payments to help with intermittent unexpected expenses (mainly to those in receipt of qualifying benefits), to payments aimed at certain groups to help with events. The fund does not therefore fall exclusively into any one of the Departmental client groups of **Children, Working Age** and **Older People**, although Social Fund payments are either paid to, or benefit, all these groups. Some statistics in this report are shown by applicant or claimant groups that fall into one or more of the wider client groups.

Applicant Group Definitions

Pensioners

Includes:

- applicant or partner at minimum state pension age or over with Pension Credit
- applicant or partner at minimum state pension age or over in receipt of state retirement pension

Includes also where applicant is under minimum state pension age and partner is:

- minimum state pension age or over with Income Support (IS) pensioner premium
- 80 or over with IS higher pensioner premium
- minimum state pension age to 79, disabled with IS higher pensioner premium

Unemployed

Includes:

- unemployed or with training allowance

Disabled

Includes:

- in receipt of Employment and Support Allowance
- applicant or partner aged under minimum state pension age with IS disability premium
- lone parent with IS disability premium
- family with IS disability premium
- others with IS disability premium
- in receipt of other benefit for incapacity or disablement

Lone Parent

Includes:

- person who has no partner and is receiving Income Support because they are responsible for a child

Others

Includes:

- involved in a trade dispute
- in paid employment
- not known or unallocated

Note:

It is possible that an applicant who is unemployed may receive a disability or pensioner premium. Such an applicant would be counted as unemployed.

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