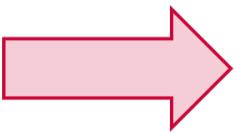


## Social Security Experience Panels: Case Transfer Survey Findings

### Background

**Department  
for Work and  
Pensions**



**Scottish  
Government**



The Scottish Government are becoming responsible for some of the benefits previously delivered by the Department for Work and Pensions (DWP). As part of work to prepare for this change, Scottish Government set up the Social Security Experience Panels.

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The Experience Panels are made up over 2,400 people from across Scotland who have recent experience of at least one of the benefits that are coming to Scotland.



The Scottish Government is working with Experience Panel members to create Scotland's new social security system.

**2,400+**  
**Experience Panel**  
**members**

## About the research

This report details the findings of the case transfer research with Experience Panels Members.

Social Security Scotland will be taking over paying benefits for people already receiving payments from DWP. This will involve receiving information from DWP about clients and taking over their payments. This process is called 'case transfer.'



**2,456**  
invites

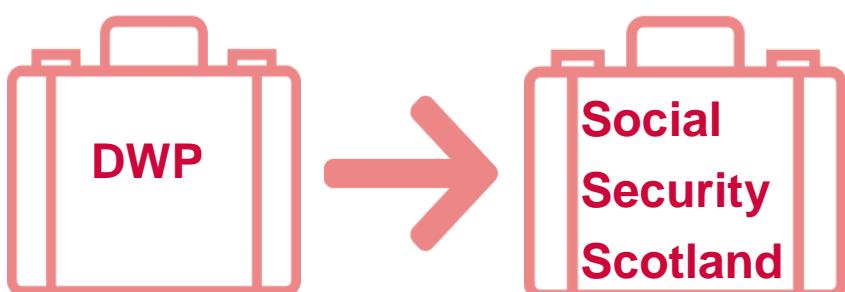
**404**  
survey  
responses

The research took place in

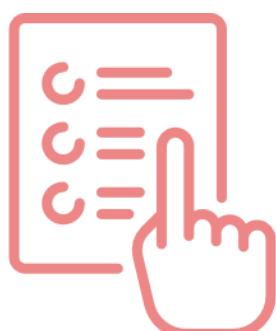


**2019**

**The research asked:**



Respondents ideas  
about the best way  
to transfer cases



What  
respondents  
thought was  
important about  
the transfer of  
cases



Respondents  
thoughts on  
when cases  
should transfer  
over

Respondents were between

**16 – 79**

years old



**35%**

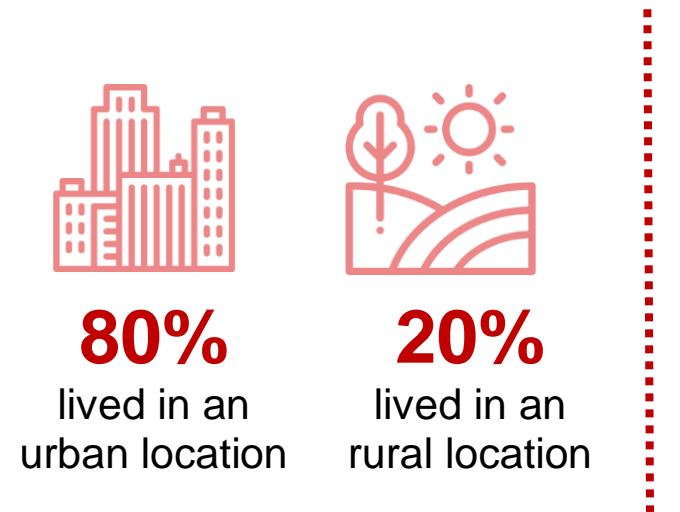
Man or boy



**65%**

Woman or girl

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**Just over 8 in 10 survey respondents had a disability or long term health condition, including:**



chronic pain



severe hearing impairments



severe visual impairments



other kinds of long term health condition

## Views on priorities

Respondents were given a list of possible priorities for the transfer of cases.

Almost all respondents rated the following two priorities as '**very important**':



Clients continue to receive the **correct payments at the correct time**



Clients **will be no worse off** when their case transfers

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**Almost 9 in 10** respondents rated the following two priorities as '**very important**':



**Distruption is minimised** for all clients coming over from DWP



**Clients don't have to re-apply** for the benefit as part of the case transfer process

**Around 1 in 10** respondents said that these priorities were '**important**'

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**Around 8 in 10** rated the following priority as ‘**very important**’:



For disability benefits, **no-one** will be subject to a **face to face re-assessment** by DWP

Over **1 in 10** said that it was ‘**important**’.

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Around **6 in 10** respondents rated the following priority as ‘**very important**’:



Client cases are transferred **as soon as possible**.

**Around a quarter** said that it was ‘**important**’

Around **1 in 10** respondents said that it was **not very important** or **not at all important**.

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Just over **5 in 10** rated the following priority as ‘**very important**’:



Cases are transferred based on **what is best for the majority of clients**

Just over **3 in 10** respondents said that it was ‘**important**’

Around **1 in 10** said that it was ‘**not very important**’ or ‘**not at all important**’

## The most important priority

We asked respondents to choose the priority that they thought was the **most important**.



The most popular option was '**clients continue to receive the correct payments at the correct time**' with **almost 3 in 10** respondents saying this was **the most important**

We asked respondents **why** they had selected this as the most popular option.

The most popular reason was that **people need the money from their benefits to live on** and that not receiving a payment on time would be a struggle.

"People on benefits are already struggling. Stopping payments while they reapply or changeover will see them suffer more hardship. Many facing hunger and worse, homelessness."

"Most clients already struggle to work on a very small budget it would be totally unfair to add any more pressure."

"Money is vital to pay for food and electricity/gas, clothing etc."



**Also very popular, with just over a quarter of** respondents selecting it as the most important was '**for disability benefits, no-one will be subject to a face to face re-assessment by DWP'**

Many respondents told us they find assessment's **stressful**.

"Having to be re-assessed is so very, very stressful."

"Everyone fears face to face meetings. It causes unnecessary stress, worry and anxiety that could be completely avoided with a good application system."



'Clients **not needing to re-apply** for the benefit as part of the case transfer' was also popular with **15% of respondents** selecting it as the most important

Similar to face to face assessments, respondents told us having to re-apply for benefits was also **stressful**.

"The most distressing experience for claimants is reapplying for benefits they have already qualified for."

"The Stress of having to re-apply for benefits sometimes too much for some people."

## Least important priority



**Only 1% chose ‘cases are transferred **based on what is best for the majority of clients**’ as the most important priority.**

This was the least popular option with respondents.



Some respondents told us that cases should be transferred based on what is **best for the individual**, not the majority.

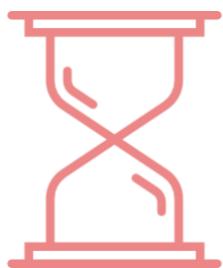
“I would hope the person comes first NOT what is best for the majority!”

“What you should do, is transfer each case based on what is best for the individual.”

## When to transfer cases

We asked respondents **when** they thought cases should be transferred over.

**Just over half** of respondents (57%) selected the option ‘all cases transferred from DWP **with a balance** between speed and making sure there are no mistakes’



We asked respondents why they had chosen this option

“Taking a little more time in the long run will ensure no mistakes are made”

“I don't want mistakes to be made but I want my payments to be handled by the Scottish government as soon as possible.”

“I would like to see the transfer done as fast as possible, but not if this means there could be issues with payments.”

“Speed is important but mistakes are expensive and stressful.”



**Around 3 in 10** respondents (29%) selected the option ‘all cases transferred from DWP **over a longer time**, making sure there are no mistakes’

Respondents told us that mistakes should be avoided at all costs.

“Mistakes should not happen, this would just cause more upset and stress.”

“It’s important that cases are done properly, not quickly.”



**Around 14%** of respondents said that ‘all cases transferred from DWP **as fast as possible**’ was the best option.

The most popular reason for selecting this option was wanting to leave the DWP system.

“Mistakes can always be rectified. The stress and pain and problems caused by dealing with DWP cannot, it can actually make some conditions worse.

“Clients will feel more secure under the new system, rather than D.W.P”

## Other Priorities

We asked respondents if there was anything else that is important to consider when thinking about case transfers.



The most common thing respondents told us was that **they wanted to be kept up to date** of the case transfer process

“Clear information for all recipients about what will happen, when it will happen and how it will happen.”

“Keep us informed at every stage.”

“Keep clients up to date on progress, doesn't matter how long it takes if people are kept informed.”



Respondents also spoke about the need for staff who are fully trained and knowledgeable

“Have the staff of the Social Security of Scotland all having training, and support so they can cope with the changes.”



Many respondents told us that they want **the system to be tested** beforehand to prevent mistakes

“Cases should transfer over as soon as Social Security Scotland has the necessary systems and staff in place and they have been properly tested.”

“This system should be well tried out and tested before commissioned to minimise the amount of errors which can be made”



Respondents also told us that being able to have **accessible** and **easy modes of contact** with Social Security Scotland is important.

“ Make it easy for people to contact SSS to ask questions as there are bound to be lots of clients who do not know what exactly is going on.”

“The ability to communicate via email telephone and hopefully in person too.”

## What's Next?

We will carry out further work with Experience Panel members to better understand the views expressed on case transfer.

The feedback from this research is helping the Scottish Government and Social Security Scotland make decisions about how cases should be transferred from DWP to the Scottish Government.

### How to access background or source data

The data collected for this social research publication:

- are available in more detail through Scottish Neighbourhood Statistics
- may be made available on request, subject to consideration of legal and ethical factors. Please contact [SocialSecurityExperience@gov.scot](mailto:SocialSecurityExperience@gov.scot) for further information.
- cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.



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