

# Remote signing trial – staff guidance

## Background

1. This guidance is aimed specifically at staff in the Remote Signing pilot, separate guidance is available for the Online Signing, Clerical and Digital Drop and Go pilots. The guidance may state that duties are performed by ‘advisers’, however, all the activities must be undertaken by a member of staff deemed appropriate to perform that specific role.

2. Remote Signing arrangements do not affect any Work Coach (or advisory) interventions. The pilot is testing the differences created by changing only the face-to-face Jobsearch Review element of claiming Jobseeker’s Allowance (JSA).

3. Instead of the current face-to-face Jobsearch Review, claimants within this pilot will submit a Remote Signing Template via e-mail and take part in a telephone intervention. They will notify the Jobcentre via e-mail/Universal Jobmatch of their jobsearch activity over their last signing period and this includes the claimant’s declarations. This pilot will have 2 groups that claimants will be selected into via an ‘Remote Signing Random Assignment Tool’:

- control group (current JR process);
- Remote Signing group.

4. The aim of the Remote Signing pilot is to test the effect of replacing face-to-face Jobsearch Reviews with digital data gather and telephony intervention.

5. The sites taking part in this pilot are:

- South London – Bromley JC, Purley JC;
- Bedfordshire and Hertfordshire – Hemel Hempstead JC; and
- Greater Wessex – Bournemouth JC, Portsmouth JC.

## **Claimant attends New Jobseeker Interview (NJI) NJI/Diagnostic Interview/Rapid Reclaim Interview**

6. When a jobseeker makes a new claim to JSA (IB)/JSA (C) in the Remote Signing pilot location attends their New Jobseeker Interview (NJI)/Rapid Reclaim Interview or Diagnostic Interview (if this is separate to the NJI), the actions within this section need to be taken, in addition to the normal interview activity.

7. Claimants who have previously been on the Work Programme but are making a new JSA claim must be allocated to a treatment group via the Remote Signing Random Assignment Tool.

## Remote Signing Random Assignment Tool

8. The Remote Signing Random Assignment Tool must be used to determine which of the 2 pilot groups the claimant will be assigned to. The claimant's National Insurance Number (NINO) should be entered into the Random Assignment Tool then click the 'Assign' button. The claimant is then allocated to either, the 'Control group' or 'Remote Signing group'.

9. To ensure the evaluation is robust, it is essential that claimants are only placed into the pilot group they have been allocated to by the Random Assignment Tool.

## Control Group Claimants

10. Where a claimant is placed into the control group, set the LMS pilot marker to 'Remote Signing' and the pilot stage to 'Control'. The claimant will then continue their journey and undertake Jobsearch Reviews in the normal way.

## Exemptions to the Remote Signing group

11. Once the claimant has been placed into the Remote Signing group, consider whether they are exempt from the pilot. The claimant **will be** exempt if the claimant has:

- no e-mail address;
- no telephone;
- no access to their own IT or a suitable alternative (outside the Jobcentre);
- no NINO;
- a current fraud flag on CIS;
- been disallowed within the last 3 months for actively seeking employment/AVAIL/RE;
- had more than 6 Out of Work benefit periods in the last 12 months;
- declared they are in part time work.

12. The claimant **may be** exempt from the Remote Signing group. Consider the following reasons for exemption:

- vulnerable – claimant meets the criteria for being deemed vulnerable as listed on the [DWP Vulnerable Group Hub](#) and as a result would not be able to participate in the pilot; and
- other reasons (for example MAPPA cases, IT illiterate, banned from attending the office, unacceptable claimant behaviour, significant language barrier, accessibility issues with using the Remote Signing Template).

13. It will be for advisers to use their discretion in exempting claimants from the Remote Signing group who fall into the categories in paragraph 12 above. The nature of the exemptions in paragraph 12 should not be an automatic reason to exempt claimants as they may still be capable of taking part in the pilot.

14. If the claimant is exempt:

- set the LMS pilot marker to 'Remote Signing' and the pilot stage to 'Remote Exempt: SBR/OOW/PTW/VUL/RTP/OTH';
- record 'exempt' and the reason for the exemption in LMS Conversations; and
- annotate the LMU 'Remote Signing – Exempt' and the reason for the exemption.

15. The claimant will then continue their journey and undertake Jobsearch Reviews in the normal way.

## Explain Pilot Requirements

16. If the claimant has been selected by the Random Assignment Tool to be in the Remote Signing group and is suitable for the pilot; the adviser must fully explain the Remote Signing process to the claimant, including that:

- they will be provided with the unique identifier (ID) in a joining letter which they must use in the Remote Signing Template and on the 'Subject' line of the e-mail when sending in their template. This can also be recorded on the claimant's ES 40;
- they will be provided with a DWP generic e-mail address on the joining letter and informed that all templates/e-mails must be sent to this address;
- they will need to provide a valid e-mail address and this will be tested before Remote Signing can begin. This e-mail address **must** be used to submit the Remote Signing Template and failure to do so may result in them leaving the pilot;
- they will be sent a Remote Signing Template to their nominated e-mail address that will need to be saved and completed for each signing period. Advise the claimant that on the template, as well as a unique ID, a contact telephone number is required;
- they will be required to e-mail their evidence of what they have been doing to actively seek employment as well as their declaration of availability **and** participate in a telephone intervention;
- the claimant has to be available for work and has to supply evidence of what actively seeking employment activity they have undertaken for the last signing period, which has to be evidenced in case DMA action is required. Evidence can be provided either by allowing DWP access to their UJ account or including it on the Remote Signing Template. If supplied on the template the claimant must include jobsearch activity:
  - undertaken;
  - start date (the first day of activity after the last signing day); and
  - end date (the next signing day).
- they will be issued a specific 'signing' day and all templates/e-mails and evidence must be returned during the time period specified on the joining letter passed to the claimant. This date and time **must** be adhered to and if they fail to meet this time slot on any 2 occasions they will be removed from the pilot;
- a telephone appointment must also be made on the same 'signing' day. The claimant must be told to expect a telephone call on this date within the time window on the joining letter given to the claimant. The time window is to be decided locally. The claimant must be informed that the incoming call may not

show any caller ID and that if they fail to participate in any 2 of these telephone calls they will be removed from the pilot;

- if the claimant isn't or won't be available to take the telephone call they must be told to inform the Jobcentre as soon as possible so that alternative arrangements can be made.

17. Participation in the pilot is voluntary. However, advisers must promote the concepts and benefits of participating in the pilot.

18. If the claimant states they do not have the skills required to undertake any of the actions required to participate in the pilot, the adviser must use their discretion to determine whether, with additional support/training this may be possible or whether they should be exempt.

19. It must also be explained to claimants that if any of the following circumstances occur, in addition to any DMA procedures, they **may** be returned to the normal JR process and they **may** be removed from the pilot:

- if they are referred to a Decision Maker for a sanction/disallowance due to their Availability/ASE/RE being in doubt;
- if they fail on 2 occasions to submit their Remote Signing Template to DWP within the time slot provided;
- if they fail to participate on 2 occasions in the telephone intervention; or
- if they fail to submit their Remote Signing Template from their nominated e-mail address.

### **Claimant Agrees to Participate in the Pilot**

20. If the claimant agrees to participate in the pilot, the adviser must:

- issue the claimant 2 copies of the Remote Signing Claimant Joining letter, this will include details of their first signing day, date and time to submit their e-mail template and the time window for the telephone intervention. The DWP generic e-mail address and the claimant's unique identification (ID) code must be included on the letter. The claimant should then be asked to sign the letters agreeing to the process and obligations. One copy should be retained by the claimant and the other copy filed in the LMU;
- to establish the claimant's unique ID code – it should be made up of the first three characters from their surname and the last three digits from their NINO, for example Dave Bennett, NINO: AB124562C gives the ID code BEN62C. If the claimant has less than three characters in their surname, X's should be used to replace the missing characters;
- obtain the claimants e-mail address they will use for Remote Signing and record this on the LMS client record, on the LMU and in the claimant's Action Plan. The Remote Signing Template will be sent to the claimant's e-mail address, advise claimants that the template may go into their 'junk/spam' mail box and therefore this should be checked;
- send the claimant engagement e-mail from the DWP generic e-mail address to the claimant's e-mail address, attaching the appropriate Remote Signing Template, to verify the e-mail address and confirm that it is suitable.

Claimants within the JSAg regime must be issued with the RS JSAG ASE Template and claimants within the Claimant Commitment regime must be issued with the RS CC–MWP Template. If, for any reason the e-mail address proves to be unsuitable, contact the claimant and attempt to obtain a different address. If it is not possible to obtain a valid/suitable e-mail address, you will need to remove the claimant from the pilot see Removing Claimants from the Remote Signing Pilot;

- ask the claimant whether they have a UJ account. If they do and it is accessible by Jobcentre staff, explain to the claimant that evidence of actively seeking employment can be obtained from their UJ account but the claimant must continue to submit their Remote Signing Template because this is their declaration of availability. They need to indicate on the template that their evidence of actively seeking employment should be viewed from their UJ account;
- if the claimant does not have a UJ account, they should be directed to set one up in the normal way and advised to give Jobcentre staff access, though we cannot mandate this;
- annotate the claimant's ES 40 'Remote Signing' and record the claimant's next 3 date and time slots for submitting the Remote Signing Template and planned telephone interventions;
- annotate the LMU as follows, depending on the pilot group the claimant belongs to and whether their evidence is due to be obtained by UJ then file/store the LMU in the usual way:
- 'REMOTE SIGNING – NOT UJ';
- 'REMOTE SIGNING – UJ'.

21. The claimant's unique ID code and e-mail address must also be recorded on the LMU where it can be easily identified when linking documents to LMU.

## **LMS Action**

- Include the claimant's roles and responsibilities on their Jobseeker's Agreement (JSAg) or Claimant Commitment
- Update the claimant's Action Plan with details of the claimant's involvement in the pilot and include the e-mail address the claimant has provided to submit their Remote Signing Template
- Set the signing requirements on LMS via the 'Claim' Hotspot as follows:
- Signing Time – this field should be left blank as signing times may vary;
- Pattern – defaults to 'Fortnightly' and this field should be set to reflect how frequently the claimant is required to sign – regardless of whether they are coming into the office to 'sign' or not; and
- Set the LMS Pilot marker to "Remote Signing".

## **Claimant Refuses to Participate in the Remote Signing Pilot**

22. Participation in the Remote Signing Pilot is not mandatory. However, if after trying to encourage the claimant to take part they still refuse to participate the following actions must be taken:

- set the LMS Pilot marker to 'Remote Signing' and the pilot stage to 'Remote Exempt RTP';
- record 'Remote Exempt Refusal To Participate' in LMS Conversations; and
- annotate the LMU 'Remote Exempt Refusal To Participate'.

23. The claimant will then continue their journey and undertake Jobsearch Reviews in the normal way.

## Signing Day Activity

### Claimant Actions

24. The claimant completes the Remote Signing Template for the current signing period and e-mails it into the DWP generic inbox e-mail address on the given date and within the allocated time slot. The claimant's unique ID must be quoted in the 'Subject' line so that they can be identified. The template must also include their evidence of actively seeking employment where the claimant does not allow Jobcentre staff to have access to their UJ accounts.

**Note: When Claimant Commitment is in place the claimant will still have to carry out all the requirements of their Claimant Commitment and completion of their My Work Plan in addition to their signing on activity.**

### Jobcentre Actions

25. DWP generic inbox will be checked and the claimant's Remote Signing Template retrieved. The template may be sent to either the 'junk/spam' mail box or the DWP 'inbox', therefore, both must be checked.

26. All templates/e-mails must be sent within the agreed time slot on the claimant's 'signing' day and a check made to ensure it has come from the claimants nominated e-mail address. If, they are not received at the agreed time the claimants must be asked why, during the telephone intervention.

27. If the declaration is received on the due date but not within the agreed time slot, DMA action for this reason alone is not applicable. However, the claimant must be told that the Remote Signing Template has to be submitted at the allocated time and failure to do so may result in them being taken out of the pilot. Follow procedures in 'Remote Signing Template not received on time' if the template is not received at the correct time.

28. The e-mail from the claimant must be printed and stored clerically. Electronic records must be deleted once the print is successful. If DMA action is appropriate the template must be used to populate the DART template and a print out taken.

29. If the claimant has allowed access to their UJ account, once the Remote Signing Template has been checked, access the claimant's UJ account ahead of the telephone intervention so that their evidence can be discussed. This is only where the claimant has indicated they will be providing evidence in this way.

30. If the claimant has not allowed access to their UJ account, the evidence must be included in the Remote Signing Template and this should be opened ahead of the telephone intervention so that their evidence can be discussed.

31. Make 3 attempts to contact the claimant via telephone during the agreed time window to discuss the Remote Signing Template received earlier in the day.

32. If there are any issues with the Remote Signing Template, discuss this with the claimant at their telephone intervention to obtain more information. The claimant will not be expected to send in further evidence. However, the information should be taken verbally and recorded in case future actively seeking employment doubts are raised.

33. If claimant does not answer the telephone after 3 attempts and they have not made contact to inform of reasons why they are not available, review the Remote Signing Template and:

- if there are reasons for doubt in the actively seeking employment evidence supplied refer the doubt to LMDM; or
- if evidence is satisfactory take business as usual steps to pay claimant's JSA (as there will be no grounds not to) then follow process for 'Failure to Participate in Telephone Intervention'

## **Telephone Intervention Action**

34. Review claimant's Remote Signing Template or UJ account prior to the telephone call in preparation for the intervention.

35. Have the claimants Remote Signing Template or UJ account available to view during the intervention.

36. Introduce yourself when the telephone is answered and confirm the claimants ID:

- using IT records to ask a variety of questions;
- check responses against data held;
- take appropriate action if ID cannot be confirmed.

37. Explain the reason for the telephone call if appropriate (first time) and check that the claimant fully understands the reason for the call.

38. Discuss with the claimant any unclear areas or gaps in evidence supplied in the template or via UJ account and corroborate these details with the claimant. Record on the LMU any additional information supplied at the telephone intervention.

39. If the Remote Signing Template has been submitted from a different e-mail address discuss the reasons for this with the claimant and consider removal from the pilot.

40. Agree and explain claimant's next course of action. Inform the claimant of their next telephone intervention appointment time including the date and time for submitting the Remote Signing Template.

41. if the claimant undertakes the telephone call within the Jobcentre advise them that this is not acceptable and that if they continue to do this they will be removed from the pilot;

42. If the claimant refuses to discuss their Remote Signing Template because they are not satisfied the call is genuine, end the telephone call and issue an appointment letter inviting the claimant to come in and discuss Remote Signing requirements. Consider removing claimant from the pilot following these discussions.

### **Following the telephone intervention**

43. If following the telephone intervention the adviser is satisfied with the Remote Signing Template **and** evidence received verbally from the claimant:

- record the intervention on LMS in the normal way;
- input evidence into JSAPS Dialogue 470 to prompt any payment/National Insurance credits due; and
- print out the e-mail and Remote Signing Template and file in the LMU.

44. The claimant will then remain in the Remote Signing pilot until the end of the trial, unless they move out of the pilot area or their JSA claim ceases.

45. If a doubt is raised (Availability and/or Actively Seeking Employment) following the telephone call then refer actively seeking employment doubt to LMDM.

46. If no Remote Signing Template is received **do not** make the telephone intervention. If by the next working day the template has still not been received take normal DMA 'Failing to Provide a Signed Declaration' action.

47. While participating in the pilot, it may be identified that one of the following circumstances occurs with the Remote Signing Group:

- they are sanctioned/disallowed by a Decision Maker for doubts with their Availability/ASE/RE; and
- failure to submit their Remote Signing Template from their nominated e-mail address.

48. If any of the above are identified, the following action must be taken:

- if a sanction/disallowance is given due to their Availability/ASE/RE being in doubt – the claimant must be removed from the Remote Signing pilot; and
- failure to submit Remote Signing Template from the nominated e-mail address – the reason for this must be discussed at the telephone intervention then consider if removal from the pilot is appropriate.

49. In all the above cases, normal DMA action must be considered and advisers should use their discretion. In cases where these circumstances occur repeatedly, the adviser must remove the claimant from the pilot and take the following action:



- set the LMS pilot marker to ‘Remote Signing’ and the pilot stage to ‘Remote To F2F FJR’;
- book an appointment with an adviser;
- record the action in LMS Conversations; and
- provide the claimant with a ‘Remote Signing Claimant Exit letter’.

## Joint Claims

50. Joint Claims for JSA are included in the Digital Jobsearch Review Remote Signing pilot and the following action must be taken.

### Allocating Joint Claims to a Pilot Group

51. In a Joint Claim for JSA the NINO of the benefit recipient must be put through the Remote Signing Random Assignment Tool to determine which of the 2 pilot groups the claimants are allocated to. It is essential that both claimants in the Joint Claim are placed in the same pilot group to ensure they both follow the same pilot journey and provide their declaration and evidence in the same way.

### Control Group Joint Claims JR Procedures

52. If the claimants are placed in the ‘Control Group’, the LMS Pilot Marker must be set on both LMS records and both claimants will continue their journey and undertake Jobsearch Reviews in the usual way.

### Remote Signing Group Joint Claims JR Procedures

53. In addition to the procedures in this guidance, the following actions will need to be taken:

- the pilot requirements and Remote Signing process must be explained to both claimants in a Joint Claim;
- if one claimant in the Joint Claim is exempt from the pilot, take action described in Exemptions for that claimant. The other member of the Joint Claim must be taken through the pilot process. Arrangements must be made, however, to ensure both claimants provide their declaration of entitlement on the same day;
- if both claimants agree to participate in the pilot, follow the procedures in ‘Claimant agrees to Participate in the Pilot’, ‘Pre-Signing Day Activity’ and ‘Signing Day Activity’ for both claimants. It is essential that both claimants e-mail (the same e-mail address can be used for both) their Remote Signing Template and provide their declaration and evidence of jobsearch activity **individually** via the Remote Signing Template;
- if both claimants refuse to participate in the pilot, take action described in ‘Claimant Refuses to Participate in Remote Signing Pilot’ for both claimants;
- if one of the claimants refuses to participate in the pilot take action described in ‘Claimant Refuses to Participate in Remote Signing Pilot’ for that claimant. The other member of the Joint Claim should be taken through the pilot

process. Arrangements should be made, however, to ensure both claimants provide their declaration of entitlement at roughly the same time.

## **Changes of Circumstances**

54. In addition to the existing changes of circumstances action the following action must be taken.

### **JSA Claim Closed**

55. In addition to the usual claim termination procedures, set the LMS Pilot marker to 'Remote Signing' and the pilot stage to 'Remote Closed'.

### **Claimant Returns to JSA following Disallowance/Claim Termination**

56. If a claimant, participating in the pilot, is disallowed and subsequently returns to JSA, they must be re-allocated into either of the pilot groups via the 'Random Assignment Tool'. Once allocated to one of the groups, the procedures outlined in this guidance must be followed.

### **Claimant moves to another Remote Signing Pilot office**

57. Claimants who move to another office that is participating in the Remote Signing pilot must remain in the pilot.

### **Claimant moves to an office not in Remote Signing Pilot**

58. Claimants who move to an office which is not participating in the Remote Signing pilot will no longer be required to participate in the trial – this includes other Digital FJR pilot sites. In addition to the usual transfer of claim procedures, take the action detailed in 'Removing Claimant from the Remote Signing Pilot' and set the LMS Pilot marker to 'Remote Signing' and the pilot stage to 'Remote Moved'.

## **Doubt is Raised on Claimant (Availability and/or Actively Seeking Employment)**

59. A doubt should be raised (Availability and/or Actively Seeking Employment) on a claimant participating in the pilot if:

- the evidence supplied in Remote Signing Template or UJ account is not completed fully/satisfactory and the telephone intervention has not provided any subsequent information that satisfies actively seeking employment activity or there are indications of an availability doubt;
- no evidence is provided within the Remote Signing Template or on UJ and the telephone intervention has not satisfied the adviser that the claimant is actively seeking employment or feels there is an availability doubt;

- evidence is provided but is incomplete and the telephone intervention has not provided any extra information of what the claimant has been doing to actively seek employment or feels there is an availability doubt; or
- where the Claimant Commitment is in place and following the telephone intervention the Claimant Commitment has not been met.

60. If a doubt is raised (Availability and/or Actively Seeking Employment) following the telephone call then refer actively seeking employment doubt to LMDM.

## **Failed to provide a signed declaration**

61. The usual [Failed to provide a signed declaration](#) action is to be undertaken if the claimant fails to return their Remote Signing Template on their signing day.

## **Remote Signing Template not received on time**

62. If the claimant does not send in the Remote Signing Template at the correct time on their first signing date (allowance should be made for the fact that this will be the first time). Find out the reasons why at the telephone intervention and inform the claimant that if they do not send the template in at the correct time they will be removed from the pilot. They will only be allowed 2 occasions (following the first signing date) before being removed from the pilot.

63. If the claimant fails to send the Remote Signing Template following the first time Remote Signing again discuss at the telephone call and inform the claimant if it happens again they will be removed from the pilot.

64. After the second instance of not sending the template in on time the claimant must be told at the telephone intervention that they are to be removed from the pilot and advised of the normal FJR process they will now have to follow. Issue the 'Remote Signing Claimant Exit letter' to the claimant and set the LMS marker to 'Remote to F2F FJR'.

## **Failure to Participate in Telephone Intervention**

65. If the claimant does not contact the jobcentre to advise they won't be available for the telephone intervention and after 3 attempts during the time window the claimant fails to answer the telephone but the Remote Signing Template has been received and there are no reasons to raise any doubts take the following action:

- release JSA payment;
- print e-mail and Remote Signing Template, store in LMU
- clearly mark LMU that the claimant has missed the first telephone intervention
- carry out the next Remote Signing Jobsearch Review including the telephone call at the following arranged 'signing' day

66. If the claimant takes part in the next telephone intervention find out the reasons why they missed the previous telephone call but advise that if they miss another they will be removed from the pilot.

67. If the claimant does not take part in the next or has a second time (and not informing the Jobcentre) within their current JSA claim of not participating in the telephone intervention:

- remove the claimant from the Remote Signing pilot – follow ‘Removing from the Remote Signing Pilot’ process;
- issue the ‘Remote Signing Claimant Exit letter’.

## **JSA Repeat Claims**

68. If a claimant, participating in the pilot, breaks a claim then re-claims during the pilot period, they should be re-allocated to a pilot group via the ‘Remote Signing Random Assignment Tool’. Once allocated to one of the groups, the procedures outlined in this guidance must be followed.

## **Removing Claimants from the Remote Signing Pilot**

69. If a claimant leaves the Remote Signing Pilot, or the pilot has ended, the following action will need to be taken:

- issue the Remote Signing Claimant Exit Letter to the claimant to inform them that participation in the trial has ended and what their new signing arrangements are;
- set the LMS pilot marker to ‘Remote Signing’ and the pilot stage to ‘Remote Closed’ (unless they have moved out of the pilot area);
- update the LMS signing requirements via the ‘Claim’ Hotspot;
- update the LMU; and
- update the claimant’s JSAg/Claimant Commitment.

70. If the claimant is to be removed from the pilot due to not e-mailing the Remote Signing Template at the required time:

- issue the Remote Signing Claimant Exit Letter to the claimant to inform them that participation in the trial has ended and what their new signing arrangements are;
- set the LMS pilot marker to ‘Remote Signing’ and the pilot stage to ‘Remote to F2F FJR’
- update the LMS signing requirements via the ‘Claim’ Hotspot;
- update the LMU; and
- update the claimants JSAg/Claimant Commitment.

71. If the claimant is to be removed from the pilot because they have not participated in the telephone intervention:

- issue the Remote Signing Claimant Exit Letter to the claimant to inform them that participation in the trial has ended and what their new signing arrangements are;
- set the LMS pilot marker to 'Remote Signing' and the pilot stage to 'Remote to F2F FJR'
- update the LMS signing requirements via the 'Claim' Hotspot;
- update the LMU; and
- update the claimants JSAg/Claimant Commitment.

72. If the claimant is to be removed from the pilot because they have participated on 2 occasions in the telephone intervention whilst in the Jobcentre:

- issue the Remote Signing Claimant Exit Letter to the claimant to inform them that participation in the trial has ended and what their new signing arrangements are;
- set the LMS pilot marker to 'Remote Signing' and the pilot stage to 'Remote to F2F FJR'
- update the LMS signing requirements via the 'Claim' Hotspot;
- update the LMU; and
- update the claimants JSAg/Claimant Commitment.