

Example of transitional protection calculation. (for illustration purposes only)

Jane is a 35-year-old widow who lives in a privately rented 2 bedroomed terraced house in Litherland, with her 9 year old son Jack. Jane is a carer for Jack, who needs a lot of extra support during the day as he is living with Autism.

Jane receives a letter dated 1st May 2024 inviting her to make a claim for Universal Credit (UC) by 1st August 2024

Jane makes her claim for Universal Credit on 1st June 2024

On 30th May 2024, her entitlement to legacy benefits was as follows: -

Income support	£ 54.20	per week
Child Tax Credits	£156.68	per week
Housing Benefit	£136.93	per week
Total income (legacy benefits)	£347.81	per week

As Universal Credit is calculated and paid monthly, her weekly legacy benefits of £347.81 works out at £1507.18 per month.

On making a claim to Universal Credit, her calculated entitlement, based on the same individual circumstances is £1321.29 per month.

Legacy benefit entitlement	£1507.18 per month
Universal Credit entitlement	£1321.29 per month
Difference	£ 185.89 per month

As Jane has received a Managed Migration Notice letter, Transitional Protection will apply.

An award of Transitional Element of £185.89 will be applied, matching her UC entitlement to their pre-existing legacy benefit entitlement of £1507.18 per month.

The Transitional Element will then remain at £185.89, until a change is made to the claim or benefit uprating is applied.

If an element of the UC claim is increased due to a change in circumstances or benefit uprating the Transitional Element will reduce by the same amount.

e.g. if the UC allowances increase by £50 from April 2025, the Transitional Element applied at that point would be reduced by £50, to £135.89 as the overall award (without the transitional element) would have otherwise increased by £50 and her actual UC entitlement would remain at £1507.18 per month.

NB. Jane also receives Child Benefit and Disability Living Allowance for her son and Carers Allowance for looking after him, but these are not affected by the move to Universal Credit, and they will remain in payment in the same way they were before the move.