



**Benefits and Work**  
Guides you can trust

# **The First Steps To PIP Success**

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### Disclaimer

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## Take the first steps to PIP success

Now you've taken [the PIP test](#) and decided you may score sufficient points for an award, it's time to take the first steps to making a successful PIP claim.

**Step 1** Check you meet the other qualifying conditions to claim PIP.

**Step 2** Complete a PIP1 form, usually by phone.

**Step 3** Complete a PIP2 'How your disability affects you form', this may be a paper version or an online one.

**Step 4** Undergo an assessment. The vast majority of people will have to have an assessment with a health professional, usually by telephone. This will be carried out by a company appointed by the DWP, either Capita or Independent Assessment Services (formally known as Atos Healthcare), depending on where you live

### Step 1 Check the other qualifying conditions.

As well as scoring enough points to get an award of PIP, there are a few other qualifying conditions that you need to know about. Put simply, these are:

- You need to be aged between 16 and State Pension age.
- You need to have had your current level of needs for at least three months and be likely to continue having them for a further nine months.
- If you are terminally ill you need to meet simpler qualifying rules rules
- You need to meet the residence and presence tests. If you have spent time outside Great Britain in the last three years you need to check these.

There's more details on all this in the section below. Once you are sure you meet these conditions you can move on to Step 2.

#### Age limits

To qualify for PIP initially, you need to be aged between 16 and State Pension age. As state retirement age increases over time, the age at which you will be able to make a claim for PIP will also increase. You can check your State Pension age [here](#).

People who receive PIP before they reach State Pension age will go on being able to receive it once they are over this age.

#### Qualifying period

For PIP, you need to have had your current level of needs for **at least three months** and be likely to continue having them for **a further nine months**. The three months test does not apply if you are transferring from DLA to PIP or if you are terminally ill.

#### Terminal illness

As with DLA, claimants whose death can reasonably be expected within six months automatically

qualify for the enhanced rate of the daily living component of PIP without needing an assessment or needing to meet the qualifying period.

In these circumstances you also do not need to meet the qualifying period in relation to the mobility component of PIP, but you will still need to meet the other qualifying conditions.

### **Habitual residence and presence**

To make a claim for PIP you need to be present in Great Britain, and habitually resident in the Common Travel Area which is the United Kingdom, the Channel Islands, the Isle of Man and the Republic of Ireland. Members of the armed forces and their families are treated as habitually resident in Great Britain whilst serving abroad.

In addition, a 'past presence' test means you need to have spent at least two out of the last three years – 104 out of the last 156 weeks - in Great Britain. Where you are accepted as terminally ill the past presence test doesn't apply.

The 2 year rule may not apply in some cases, including where you currently live, or have lived, in the European Economic Area or Switzerland. In some circumstances you may need to demonstrate 'a genuine and sufficient link to the UK social security system' which may include issues like having spent years living in the UK, worked here, or you or someone you depend upon is getting a benefit that can only be received through having paid UK national insurance contributions.

For more information, in the first instance you can contact:

Exportability Team Coordinator  
[exportability.team@dwp.gov.uk](mailto:exportability.team@dwp.gov.uk) (or [complete the online form](#) in link below)

If you are not happy with the response you receive you will need to try to get advice from a specialist welfare rights adviser.

## **Step 2 Complete the PIP 1 form**

To start your claim for PIP you need to make a call to:

Telephone: 0800 917 2222  
Textphone: 0800 917 7777

### **Paper PIP1 form**

If you are unable to use the telephone to make a claim you can ask for a 20 page paper claim form – a PIP1 instead.

However, we have heard from a number of people who have been refused paper claim forms in the past. If you do need a paper form, make it clear that you are asking for one in connection with your health condition or disability and that you are legally entitled to request a paper form as a reasonable adjustment under the Equality Act 2010.

Details of how to make an initial claim and request different formats are available on the .gov website: <https://www.gov.uk/pip/how-to-claim>

### **Preparing for your PIP1**

The PIP1 collects basic information about you and about whether you have one of the following conditions:

- mental health condition
- behavioural condition
- learning difficulty
- developmental disorder
- memory problem

To see in detail what questions are asked at the initial claim stage, you can download a specimen copy of the PIP1 form from the DWP website [here](#). This form should not be used to start your claim for PIP; you should call the DWP to obtain a barcoded, personalised form.

It is worth spending some time preparing for the telephone interview to try to ensure you have all the necessary information to hand. This will include:

- your National Insurance number
- your address
- your date of birth
- your bank or building society details
- your telephone number
- the name of your doctor or health worker you want the DWP to contact
- details of any time you've spent out of the country
- details if you're in a care home or hospital, or if you've recently been in one
- whether you have a terminal illness.

## **Paper or online 'How your disability affects you' PIP2 form**

When you make your initial telephone call to claim PIP, you should be offered the choice to either have a paper 'PIP2 'How your disability affects you' form posted out to you or to complete your claim online.

### **Paper form**

The paper form, including an accompanying tear-off letter, is around 38 pages long and there is also an information booklet which is 12 pages long. An address to return the form to is printed on the back page. This page can be folded so the address shows in the window of the envelope that comes with the form.

### **Online form**

If you decide to claim online, you will be emailed a link to a web page where you create a password and enter basic personal information so that the DWP can check it matches what they have on record about you.

You must do this within 7 days of being sent the link. If you miss this deadline you will need to contact the DWP again to request a new link.

Once you have completed this stage, you will be sent a security code which allows you to access your online form.

The online form is identical to the paper form.

You can do the different sections in any order you choose and you can save the form and return to it at any time.

You can also upload scans or photos of supporting evidence.

You can send further supporting evidence later, either online or by post, so don't delay returning your form because you are waiting for more evidence.

The time limit for the DWP getting your form back is the same whether it is a paper form or an online form. This is probably the main advantage of the online form – you do not have to allow time for the form to be sent and returned by post. It also removes the risk of the form getting lost in the post, although there is no guarantee there won't be technical problems with the online form.

As with the paper form, you can request further time to complete the online PIP2.

Once you have uploaded any supporting evidence you can upload your form and you will be sent a confirmation email. On the screen that tells you your information has been sent you will be given a link to download a completed copy of your form in .pdf format.

It is vital that you do this as you will not be given another chance to download your completed form and you will not be able to view it again online.

Although you can still log back into your account the only thing you can do is upload further evidence.

The decision about whether to use a paper or an electronic form is a personal one. At the moment we understand that around a quarter of claimants are choosing the online form.

## **Step 3 Complete the PIP 2 form**

Whichever type of form you choose, it is designed to collect details about:

- which professionals you see
- your health conditions or disabilities
- your medication and treatment

There are then a series of questions about each of the daily living and mobility activities, including asking about any aids or adaptations you use, whether you can complete the activities safely, to an acceptable standard, repeatedly and in a reasonable time and how your condition varies. The questions are accompanied by detailed guidance about the kind of information you need to provide.

You are also encouraged to send supporting medical evidence such as prescription lists, care plans and information from health professionals and/or to tell the DWP who they can get supporting evidence from.

In addition, you can supply non-medical evidence, such as a letter from your social worker or a friend or relative who helps you carry out everyday activities.

### **If the form is not returned**

If you do not return the form within the time limit and you do not have good cause for the delay, your claim will be refused. When deciding whether you have good cause the decision maker must take into account your state of health at the time and the nature of any disability you have.

However, if you do not return the form and you have been identified from your initial claim as having a 'mental or cognitive impairment' then Independent Assessment Services and Capita have been told that they must still make an assessment, either by collecting additional evidence – which might include telephoning you – and/or by asking you to attend a medical. The evidence will then be passed to the decision maker in the normal way.

## Help with your PIP2 form

Making the best job you can of the PIP2 'How your disability affects you' claim form is vital for a successful claim.

Yet many people are so overwhelmed by the 32 page form that they never manage to complete or return it, with the result that their PIP claim is closed.

Don't let that happen to you.

Our *Guide to PIP claims and reviews* takes you step-by-step through every single box in this large and complex form.

It sets out the law which stands behind the questions in the form demonstrates, with examples, how to give highly detailed, accurate and legally relevant evidence, box-by-box through the whole form.

Much of the additional information we suggest is not what the form prompts you for, but it's vital you include it.

For example, it isn't made clear that if you have problems with an activity for just a part of the day, that may be sufficient for you to score points, even if you can manage it for the rest of the day.

You also need to know that the decision maker may reduce your points score by suggesting aids or appliances you could use instead of getting help. Being aware in advance what aids or appliances might be suggested allows you to give accurate evidence about whether they genuinely would make a difference.

And it's vital to know how decision makers may use your ability to do things like drive a car and use them as justification to take away points for a whole range of activities that are not remotely connected.

We warn you and help you get your response in first.

Similarly, understanding what 'reliably' means in relation to PIP activities is hugely important. Giving evidence about issues such as: whether you can do things safely; whether you are in pain when you do them; whether you can do an activity in a reasonable time and what the effect is on you afterwards could make the difference between getting an award or not.

For each PIP activity, we give a list of questions that you can write answers to, in order to ensure that the responses you give are as detailed and accurate as possible.

We also show you sample answers so that you can see the type of information you might want to provide.

Our guide can't make completing the PIP form easy, but it can ensure you make an excellent job of it.

## Step 4 Attend an assessment

Once the form - and any additional evidence you include - has been returned, the health professional must review it and decide if they should send for any further evidence.

When they have all the evidence, they consider that they need the health professional has to decide what sort of assessment to carry out. This may be based just on the paper information, based on

the paper information plus a telephone call to you or by requiring you to attend a face-to-face, telephone or video assessment.

At the time of writing:

77% of assessments are telephone  
16% are paper  
5% are face-to-face  
2% are video

### **Paper-based assessments**

Unlike for ESA, the health professional can decide not to call you in even if they are going to assess you as scoring zero points. Guidance from the DWP states that paper based assessments are appropriate in:

- Cases where the evidence indicates that it is unlikely that the claimant's condition has any impact on any of the daily living and mobility activities.
- Cases where the evidence indicates that the claimant's condition has a significant impact in many of the daily living and mobility activities.
- Cases where there is strong evidence on which to advise on the case and where a face-to-face consultation is likely to be stressful to the claimant.

The DWP will send all the papers relating to your PIP claim to whoever carries out PIP assessments for the area where you live – either Capita or Independent Assessment Services. They will decide whether to carry out a paper or phone assessment.

If they decide to carry out a paper assessment this means that they will consider all the written evidence that has been submitted. This could include not just the evidence you have submitted, but any written evidence obtained from elsewhere e.g., your doctor, your nurse, social services etc.

They may also consider previous claim forms, although these will be of limited value given how old they are likely to be. There have been instances of them obtaining copies of your Work Capability Assessment.

Rather confusingly, the assessor might carry out a paper assessment, but need to phone you to clarify some issues. This is not a phone assessment. You should be able to tell as they will not ask you in detail about all the PIP activities. In addition, unlike a phone assessment, they are not required to give you 7 days' notice of the call.

### **Telephone assessments**

At the time of writing there are very few face-to-face assessments and the majority of assessments that are carried out will be telephone assessments.

### **Face-to-face assessments**

Some claimants will have to attend a face-to-face assessment with a health professional working for Independent Assessment Services or Capita, depending on where you live.

You must be given 7 days' notice of the date and time of the assessment and in the case of a face-to-face assessment where it will take place. The notice must be in writing unless you have agreed to accept communication by another means, such as text or email. The 7 days will not apply if you have agreed, in writing or otherwise, to accept a shorter notice period.

Once an assessment has been made, a decision maker then considers all the evidence, including any additional evidence obtained by you, before making a decision about how many points should be awarded for each component. The number of points will determine whether you are eligible for an award of PIP and, if so the components and rates.

### **Video assessments**

Currently there are very few of these, but they are increasing in number, perhaps because they are cheaper than face-to-face.

Clearly there are many technical issues with video communication, including the speed of your connection and whether you have a suitable smartphone or computer to take part in a video assessment. There are also all the issues of freezing, lag and drop-outs that may mean that video assessments are a poor option for you.

### **Help with your assessment**

Whatever sort of assessment you have, our *Guide to PIP claims and reviews* will help you prepare to make the best possible job of it by telling you about:

- How to prepare for your assessment
- What questions you are likely to be asked at your PIP assessment.
- Having someone with you at your assessment
- Recording your assessment
- The 'mental state examination' which may include asking you to count backwards in sevens or spell words backwards, as well as observing your appearance and behaviour.
- The questions you may not be asked, but need to make sure you answer anyway.

And much more.

Assessments are a nerve-wracking experience for any claimant, but knowing what to expect and knowing that you are fully prepared can make a tremendous difference to the outcome.

## **Download our PIP claims guide and save 20%**

Join the Benefits and Work community today and you won't just be able to download our 140 page *Guide to PIP claims and reviews*.

You will also be able to download the huge range of other guides and resources relating to PIP, universal credit, employment and support allowance and disability living allowance.

You'll also be able to post queries in our forum and have them answered by highly experienced volunteer moderators as well as other members.

There's even a big discount on our online PIP training course, if you decide you want to improve your PIP knowledge to the point where you can support others with their claims.

To join the Benefits and Work community and get 20% off the usual price -£15.95 instead of £19.95 - just put this code in the Coupon box when you subscribe:

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