
STATUTORY INSTRUMENTS

2002 No. 1792

SOCIAL SECURITY

The State Pension Credit Regulations 2002

Made - - - - *11th July 2002*
Coming into force - - *6th October 2003*

Whereas a draft of this Instrument was laid before Parliament in accordance with section 19(2) of the State Pension Credit Act 2002 and section 11(3) of the Social Security Fraud Act 2001 and approved by resolution of each House of Parliament;

Now, therefore, the Secretary of State, in exercise of the powers conferred upon him by section 175 (3) to (5) of the Social Security Contributions and Benefits Act 1992^{M1}, sections 7(4A), 9(4A) and 11(1) and (4) of the Social Security Fraud Act 2001^{M2} and sections 1(5), 2(3), (4) and (6), 3(4) to (8), 4(3), 5, 6(2), 7(4) and (7), 9(4) and (5), 12(2) and (3), 15, 16(2) and 17(1) and (2) of the State Pension Credit Act 2002^{M3}, hereby makes the following Regulations:

Modifications etc. (not altering text)

- C1** Instrument modified (for specified purposes and with effect in accordance with art. 1(2)(l) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2007 \(S.I. 2007/688\)](#), art. 26(6), **Sch. 20**
- C2** Instrument applied (with modifications) (1.10.2010) by [The Employment and Support Allowance \(Transitional Provisions, Housing Benefit and Council Tax Benefit\) \(Existing Awards\) \(No. 2\) Regulations 2010 \(S.I. 2010/1907\)](#), **reg. 16(2)(e)(iii)(3)** (with reg. 3)
- C3** Regulations modified (temp.) (8.4.2020) by [The Social Security \(Coronavirus\) \(Prisoners\) Regulations 2020 \(S.I. 2020/409\)](#), regs. 1, **2(2)(c)** (with reg. 6(2)); (as amended (12.5.2021) by S.I. 2021/476, reg. 4(6))

Marginal Citations

- M1** [1992 c. 4](#); section 175 (3) to (5) is applied to provisions of the State Pension Credit Act 2002 by section 19(1) of that Act.
- M2** [2001 c. 11](#); sections 7(4A) and 9(4A) were inserted by the State Pension Credit Act 2002, Schedule 2, paragraphs 45(2) and 46(3).
- M3** [2002 c. 16](#).

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the State Pension Credit Regulations 2002. (See end of Document for details)

PART I

General

Citation, commencement and interpretation

1.—(1) These Regulations may be cited as the State Pension Credit Regulations 2002 and shall come into force on 6th October 2003.

(2) In these Regulations—

“the Act” means the State Pension Credit Act 2002;

“the 1992 Act” means the Social Security Contributions and Benefits Act 1992 ^{M4} ;

[^{F1}“the 2012 Act ” means the Welfare Reform Act 2012;]

[^{F2}“adoption leave” means a period of absence from work on ordinary or additional adoption leave in accordance with section 75A or 75B of the Employment Rights Act 1996;]

[^{F3}“adult disability payment” has the meaning given in regulation 2 of the Disability Assistance for Working Age People (Scotland) Regulations 2022;]

“the appointed day” means the day appointed under section 13(3) of the Act;

[^{F4}“approved blood scheme” means a scheme established or approved by the Secretary of State, or trust established with funds provided by the Secretary of State, for the purpose of providing compensation in respect of a person having been infected from contaminated blood products;]

[^{F5}“armed forces independence payment” means armed forces independence payment under the Armed Forces and Reserve Forces (Compensation Scheme) Order 2011;]

[^{F6}“the Armed Forces and Reserve Forces Compensation Scheme ”means the scheme established under section 1(2) of the Armed Forces (Pensions and Compensation) Act 2004;]

“attendance allowance” means—

- (a) an attendance allowance under section 64 of the 1992 Act;
- (b) an increase of disablement pension under section 104 or 105 of the 1992 Act;
- (c) ^{F7}
- (d) ^{F7}
- (e) a payment by virtue of article 14, 15, 16, 43 or 44 of the Personal Injuries (Civilians) Scheme 1983 ^{M5} or any analogous payment; or
- (f) [^{F8}any payment based on a need for attendance which is paid as part of a war disablement pension, or any other such payment granted in respect of disablement which falls within regulation 15(5)(ac);]

[^{F9}“benefit week” means—

- (a) where state pension credit is paid in advance, the period of 7 days beginning on the day on which, in the claimant’s case, that benefit is payable;
- (b) where state pension credit is paid in arrears, the period of 7 days ending on the day on which, in the claimant’s case, that benefit is payable.]

[^{F10}“board and lodging accommodation ” means accommodation provided to a person or, if he is a member of a family, to him or any other member of his family, for a charge which is inclusive of—

- (i) the provision of that accommodation, and

- (ii) at least some cooked or prepared meals which both are cooked or prepared (by a person other than the person to whom the accommodation is provided or a member of his family) and are consumed in that accommodation or associated premises,

but not accommodation provided by a close relative of his or of his partner, or other than on a commercial basis;.]

“care home” [F11in England] has the meaning it has for the purposes of the Care Standards Act 2000 M6 by virtue of section 3 of that Act [F12and in [F13Wales and] Scotland means a care home service];

[F14“care home service” [F15in Wales means a care home service within the meaning of Part 1 of the Regulation and Inspection of Social Care (Wales) Act 2016 which is provided wholly or mainly to persons aged 18 or over and in Scotland] has the meaning assigned to it by paragraph 2 of schedule 12 to the Public Services Reform (Scotland) Act 2010;]

[F16“carer support payment” means carer’s assistance given in accordance with the Carer’s Assistance (Carer Support Payment) (Scotland) Regulations 2023;]

[F17“the Caxton Foundation” means the charitable trust of that name established on 28th March 2011 out of funds provided by the Secretary of State for the benefit of certain persons suffering from hepatitis C and other persons eligible for payment in accordance with its provisions;]

[F18“child abuse payment” means a payment from a scheme established or approved by the Secretary of State for the purpose of providing compensation in respect of historic institutional child abuse in the United Kingdom;]

“the Claims and Payments Regulations” means the Social Security (Claims and Payments) Regulations 1987M7;

“close relative” means a parent, parent-in-law, son, son-in-law, daughter, daughter-in-law, step-parent, step-son, step-daughter, brother, sister, [F19or if any of the preceding persons is one member of a couple, the other member of that couple], the other member of that couple;

[F20“contribution-based jobseeker’s allowance” means an allowance under the Jobseekers Act 1995 as amended by the provisions of Part 1 of Schedule 14 to the 2012 Act that remove references to an income-based allowance, and a contribution-based allowance under the Jobseekers Act 1995 as that Act has effect apart from those provisions;]

[F21“contributory employment and support allowance” means an allowance under Part 1 of the Welfare Reform Act as amended by the provisions of Schedule 3, and Part 1 of Schedule 14, to the 2012 Act that remove references to an income-related allowance, and a contributory allowance under Part 1 of the Welfare Reform Act as that Part has effect apart from those provisions;]

F22[F23“couple” means—

- (a) two people who are married to, or civil partners of, each other and are members of the same household; or
- (b) two people who are not married to, or civil partners of, each other but are living together [F24as if they were a married couple or civil partners];]

[F25“the Computation of Earnings Regulations” means the Social Security Benefit (Computation of Earnings) Regulations 1996;]

[F25 “dwelling occupied as the home” means the dwelling together with any garage, garden and outbuildings, normally occupied by the claimant as his home including any premises not so occupied which it is impracticable or unreasonable to sell separately, in particular, in Scotland, any croft land on which the dwelling is situated;]

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“Eileen Trust” means the charitable trust of that name established on 29th March 1993 out of funds provided by the Secretary of State for the benefit of persons eligible for payment in accordance with its provisions;

[^{F26}“the Employment and Support Allowance Regulations” means the Employment and Support Allowance Regulations 2008;]

[^{F27} “enactment” includes an enactment comprised in, or in an instrument made under, an Act of the Scottish Parliament [^{F28}or the National Assembly for Wales];]

[^{F29}“equity release scheme” means a loan—

- (a) made between a person (“ the lender ”) and the claimant;
- (b) by means of which a sum of money is advanced by the lender to the claimant by way of payments at regular intervals; and
- (c) which is secured on a dwelling in which the claimant owns an estate or interest and which he occupies as his home;]

[^{F30}“foreign state retirement pension” means any pension which is paid under the law of a country outside the United Kingdom and is in the nature of social security;]

“the Fund” means moneys made available from time to time by the Secretary of State for the benefit of persons eligible for payment in accordance with the provisions of a scheme established by him on 24th April 1992 or, in Scotland, on 10th April 1992;

“full-time student” has the meaning prescribed in regulation 61(1) of the Income Support Regulations;

[^{F31}“the Graduated Retirement Benefit Regulations” means the Social Security (Graduated Retirement Benefit) Regulations 2005;]

[^{F32}“Grenfell Tower payment” means a payment made for the purpose of providing compensation or support in respect of the fire on 14th June 2017 at Grenfell Tower;]

[^{F6}“a guaranteed income payment” means a payment made under article 14(1)(b) or article 21(1)(a) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2005;]

[^{F33} “the Health Service Act” means “the National Health Service Act 2006”];]

[^{F33}“the Health Service (Wales) Act” means “the National Health Service (Wales) Act 2006”];]

[^{F34}“the Horizon system” means any version of the computer system used by the Post Office known as Horizon, Horizon Legacy, Horizon Online or HNG-X;]

[^{F35} “income-based jobseeker’s allowance” means an income-based allowance under the Jobseekers Act 1995;]

[^{F36}“income-related employment and support allowance” means an income-related allowance under Part 1 of the Welfare Reform Act (employment and support allowance);]

“the Income Support Regulations” means the Income Support (General) Regulations 1987 ^{M8};

[^{F37}“independent hospital”—

- (a) in England, means a hospital as defined by section 275 of the National Health Service Act 2006 that is not a health service hospital as defined by that section;
- (b) in Wales, has the meaning assigned to it by section 2 of the Care Standards Act 2000; and
- (c) [^{F38} in Scotland, means an independent health care service as defined in section 10F(1) (a) and (b) of the National Health Service (Scotland) Act 1978;]]

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[^{F40} “the Independent Living Fund (2006)” means the Trust of that name established by a deed dated 10th April 2006 and made between the Secretary of State for Work and Pensions of the one part and Margaret Rosemary Cooper, Michael Beresford Boyall and Marie Theresa Martin of the other part;]

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[^{F44} “local welfare provision” means occasional financial or other assistance given by a local authority, the Scottish Ministers or the Welsh Ministers, or a person authorised to exercise any function of, or provide a service to, them, to or in respect of individuals for the purpose of—

- (a) meeting, or helping to meet, an immediate short term need—
 - (i) arising out of an exceptional event, or exceptional circumstances; and
 - (ii) that requires to be met in order to avoid a risk to the well-being of an individual; or
- (b) enabling individuals to establish or maintain a settled home, where those individuals have been or, without the assistance, might otherwise be—
 - (i) in prison, hospital, a residential care establishment or other institution; or
 - (ii) homeless or otherwise living an unsettled way of life;]

[^{F45} “the London Bombings Relief Charitable Fund” means the company limited by guarantee (number 5505072) and registered charity of that name established on 11th July 2005 for the purpose of (amongst other things) relieving sickness, disability or financial need of victims (including families or dependants of victims) of the terrorist attacks carried out in London on 7th July 2005;]

[^{F46} “the London Emergencies Trust” means the company of that name (number 09928465) incorporated on 23rd December 2015 and the registered charity of that name (number 1172307) established on 28th March 2017;]

“the Macfarlane (Special Payments) Trust” means the trust of that name, established on 29th January 1990 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia;

“the Macfarlane (Special Payments) (No. 2) Trust” means the trust of that name, established on 3rd May 1991 partly out of funds provided by the Secretary of State, for the benefit of certain persons suffering from haemophilia and other beneficiaries;

“the Macfarlane Trust” means the charitable trust, established partly out of funds provided by the Secretary of State to the Haemophilia Society, for the relief of poverty or distress among those suffering from haemophilia;

[^{F47} “member of the work-related activity group” means a claimant who has or is treated as having limited capability for work under either—

- (a) Part 5 of the Employment and Support Allowance Regulations 2008 other than by virtue of regulation 30 of those Regulations; or
- (b) Part 4 of the Employment and Support Allowance Regulations 2013 other than by virtue of regulation 26 of those Regulations;]

[^{F30} “MFET Limited” means the company limited by guarantee (number 7121661) of that name, established for the purpose in particular of making payments in accordance with arrangements made with the Secretary of State to persons who have acquired HIV as a result of treatment by the NHS with blood or blood products;]

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[^{F48} “the National Emergencies Trust” means the registered charity of that name (number 1182809) established on 28th March 2019;]

[^{F49} “parental bereavement leave” means leave under section 80EA of the Employment Rights Act 1996;]

[^{F50} “paternity leave” means a period of absence from work on ^{F51} ... paternity leave by virtue of section 80A or 80B of the Employment Rights Act 1996 ^{F52} ... ;]

[^{F53} “patient”, except in Schedule II, means a person (other than a prisoner) who is regarded as receiving free in-patient treatment within the meaning of regulation 2(4) and (5) of the Social Security (Hospital In-Patients) Regulations 2005];

“pension fund holder” means with respect to [^{F54} an occupational pension scheme,] a personal pension scheme or retirement annuity contract, the trustees, managers or scheme administrators, as the case may be, of the scheme or contract concerned;

[^{F1} “personal independence payment” means personal independence payment under Part 4 of the 2012 Act;]

“policy of life insurance” means any instrument by which the payment of money is assured on death (except death by accident only) or the happening of any contingency dependent on human life, or any instrument evidencing a contract which is subject to payment of premiums for a term dependent on human life;

[^{F34} “the Post Office” means Post Office Limited (registered number 02154540);]

[^{F34} “Post Office compensation payment” means a payment made by the Post Office or the Secretary of State for the purpose of providing compensation or support which is—

- (a) in connection with the failings of the Horizon system; or
- (b) otherwise payable following the judgment in *Bates and Others v Post Office Ltd* ((No. 3) “Common Issues”);]

“prisoner” means a person who—

- (a) is detained in custody pending trial or sentence upon conviction or under a sentence imposed by a court; or
- (b) is on temporary release in accordance with the provisions of the Prison Act 1952 ^{M9} or the Prisons (Scotland) Act 1989 ^{M10} ,

other than a person detained in hospital under the provisions of the Mental Health Act 1983 ^{M11} , or in Scotland, under the provisions of the [^{F55} Mental Health (Care and Treatment) (Scotland) Act 2003] or the Criminal Procedure (Scotland) Act 1995 ^{M12};

[^{F27} “public authority” includes any person certain of whose functions are functions of a public nature;]

“qualifying person” means a person in respect of whom [^{F56} a Grenfell Tower payment [^{F57}, a child abuse payment [^{F58}, a Windrush payment, a Post Office compensation payment or a vaccine damage payment]] has been made or] payment has been made from the Fund [^{F59}, the Eileen Trust [^{F60}, MFET Limited]] [^{F61}, the Skipton Fund]] [^{F62}, the Caxton Foundation]] [^{F63}, the Scottish Infected Blood Support Scheme]] [^{F64}, an approved blood scheme]] [^{F65}, the London Emergencies Trust, the We Love Manchester Emergency Fund]] [^{F66}, the National Emergencies Trust]] [^{F67}, the Victims of Overseas Terrorism Compensation Scheme] or the London Bombings Relief Charitable Fund];

[^{F68} “Scottish Infected Blood Support Scheme” means the scheme of that name administered by the Common Services Agency (constituted by section 10 of the National Health Service (Scotland) Act 1978);]

[^{F69}

[^{F70} “shared parental leave” means leave under section 75E or 75G of the Employment Rights Act 1996;]

[^{F71} “the Skipton Fund” means the ex-gratia payment scheme administered by the Skipton Fund Limited, incorporated on 25th March 2004, for the benefit of certain persons suffering from hepatitis C and other persons eligible for payment in accordance with the scheme’s provisions;]

[^{F72} “tax credit closure notice” means a notice issued under article 3A (tax credit closure notice) of the Welfare Reform Act 2012 (Commencement No. 32 and Savings and Transitional Provisions) Order 2019;]

[^{F73} “universal credit” means universal credit under Part 1 of the 2012 Act;]

[^{F34} “vaccine damage payment” means a payment made under the Vaccine Damage Payments Act 1979;]

[^{F74} “the Victims of Overseas Terrorism Compensation Scheme” means the scheme of that name established by the Ministry of Justice in 2012 under section 47 of the Crime and Security Act 2010;]

[^{F75} “voluntary organisation” means a body, other than a public or local authority, the activities of which are carried on otherwise than for profit;]

“water charges” means—

- (a) as respects England and Wales, any water and sewerage charges under Chapter 1 of Part V of the Water Industry Act 1991 ^{M13} ;
- (b) as respects Scotland, any water and sewerage charges under Schedule 11 to the Local Government Finance Act 1992 ^{M14} ;

in so far as such charges are in respect of the dwelling which a person occupies as his home;

[^{F76} “the We Love Manchester Emergency Fund” means the registered charity of that name (number 1173260) established on 30th May 2017;]

[^{F77} “the Welfare Reform Act” means the Welfare Reform Act 2007.]

[^{F18} “Windrush payment” means a payment made under the Windrush Compensation Scheme (Expenditure) Act 2020.]

(3) In these Regulations, unless the context otherwise requires, a member of [^{F78} a couple] is referred to as a partner and both members are referred to as partners.

[^{F79} (3A) References in these Regulations to a claimant participating as a service user are to—

- (a) a person who is being consulted by or on behalf of—
 - (i) a body which has a statutory duty to provide services in the field of health, social care or social housing; or
 - (ii) a body which conducts research or undertakes monitoring for the purpose of planning or improving such services,in their capacity as a user, potential user, carer of a user or person otherwise affected by the provision of those services; or

[a person who is being consulted by or on behalf of—
^{F80}(ab)

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- (i) the Secretary of State in relation to any of the Secretary of State's functions in the field of social security or child support or under section 2 of the Employment and Training Act 1973; or
 - (ii) a body which conducts research or undertakes monitoring for the purpose of planning or improving such functions,
in their capacity as a person affected or potentially affected by the exercise of those functions or the carer of such a person;]
 - (b) the carer of a person consulted under [^{F81}sub-paragraphs (a) or (ab)].]
- (4) In these Regulations, unless the context otherwise requires, a reference—
- (a) to a numbered section is to the section of the Act bearing that number;
 - (b) to a numbered Part is to the Part of these Regulations bearing that number;
 - (c) to a numbered regulation or Schedule is to the regulation in, or Schedule to, these Regulations bearing that number;
 - (d) in a regulation or Schedule to a numbered paragraph is to the paragraph in that regulation or Schedule bearing that number;
 - (e) in a paragraph to a lettered or numbered sub-paragraph is to the sub-paragraph in that paragraph bearing that letter or number.

Textual Amendments

- F1** Words in reg. 1(2) inserted (8.4.2013) by The Personal Independence Payment (Supplementary Provisions and Consequential Amendments) Regulations 2013 (S.I. 2013/388), reg. 2, **Sch. para. 27(2)**
- F2** Words in reg. 1(2) inserted (6.10.2003) by The State Pension Credit (Transitional and Miscellaneous Provisions) Amendment Regulations 2003 (S.I. 2003/2274), regs. 1, **2(2)**
- F3** Words in reg. 1(2) inserted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(2)**
- F4** Words in reg. 1(2) inserted (23.10.2017) by The Social Security (Infected Blood and Thalidomide) Regulations 2017 (S.I. 2017/870), regs. 1, **5(2)(a)**
- F5** Words in reg. 1(2) inserted (8.4.2013) by The Armed Forces and Reserve Forces Compensation Scheme (Consequential Provisions: Subordinate Legislation) Order 2013 (S.I. 2013/591), art. 2(2), **Sch. para. 23(2)**
- F6** Words in reg. 1(2) inserted (4.4.2005) by The Social Security (Miscellaneous Amendments) Regulations 2005 (S.I. 2005/574), regs. 1(1), **2(1)**
- F7** Words in reg. 1(2) omitted (29.10.2013) by virtue of The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2013 (S.I. 2013/2536), regs. 1(1), **10(2)(a)**
- F8** Words in reg. 1(2) substituted (5.1.2009) by The Social Security (Miscellaneous Amendments) (No. 7) Regulations 2008 (S.I. 2008/3157), regs. 1(1), **4(2)**
- F9** Words in reg. 1(2) substituted (6.4.2010) by The Social Security (Miscellaneous Amendments) (No. 6) Regulations 2009 (S.I. 2009/3229), regs. 1, **3(2)**
- F10** Words in reg. 1(2) inserted (3.10.2005) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2005 (S.I. 2005/2465), regs. 1(2), **6(2)**
- F11** Words in reg. 1(2) inserted (2.4.2018) by The Social Security and Child Support (Regulation and Inspection of Social Care (Wales) Act 2016) (Consequential Provision) Regulations 2018 (S.I. 2018/228), regs. 1, **8(2)(a)(i)**
- F12** Words in reg. 1(2) added (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 1(a)**

- F13** Words in reg. 1(2) inserted (2.4.2018) by The Social Security and Child Support (Regulation and Inspection of Social Care (Wales) Act 2016) (Consequential Provision) Regulations 2018 (S.I. 2018/228), regs. 1, **8(2)(a)(ii)**
- F14** Words in reg. 1(2) substituted (28.10.2011) by The Public Services Reform (Scotland) Act 2010 (Consequential Modifications of Enactments) Order 2011 (S.I. 2011/2581), art. 1(2)(b), **Sch. 2 para. 35(a)**
- F15** Words in reg. 1(2) inserted (2.4.2018) by The Social Security and Child Support (Regulation and Inspection of Social Care (Wales) Act 2016) (Consequential Provision) Regulations 2018 (S.I. 2018/228), regs. 1, **8(2)(b)**
- F16** Words in reg. 1(2) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(2)**
- F17** Words in reg. 1(2) inserted (31.10.2011) by The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2011 (S.I. 2011/2425), regs. 1(2), **15(2)(a)**
- F18** Words in reg. 1(2) inserted (1.1.2022) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2021 (S.I. 2021/1405), regs. 1, **4(2)(a)**
- F19** Words in reg. 1(2) substituted (5.12.2005) by The Civil Partnership (Pensions, Social Security and Child Support) (Consequential, etc. Provisions) Order 2005 (S.I. 2005/2877), art. 1, **Sch. 3 para. 35(2)(a)(i)** (with art. 3)
- F20** Words in reg. 1(2) inserted (29.4.2013) by The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013 (S.I. 2013/630), regs. 1(2), **33(2)(a)**
- F21** Words in reg. 1(2) substituted (29.4.2013) by The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013 (S.I. 2013/630), regs. 1(2), **33(2)(d)**
- F22** Words in reg. 1(2) substituted (S) (16.12.2014) by The Marriage and Civil Partnership (Scotland) Act 2014 and Civil Partnership Act 2004 (Consequential Provisions and Modifications) Order 2014 (S.I. 2014/3229), art. 1(2), **Sch. 6 para. 23**
- F23** Words in reg. 1(2) substituted (E.W.) (13.3.2014) by The Marriage (Same Sex Couples) Act 2013 (Consequential Provisions) Order 2014 (S.I. 2014/107), art. 1(2), **Sch. 1 para. 32**
- F24** Words in reg. 1(2) substituted (2.12.2019) by The Civil Partnership (Opposite-sex Couples) Regulations 2019 (S.I. 2019/1458), reg. 1(2), **Sch. 3 para. 61**
- F25** Words in reg. 1(2) inserted (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) Regulations 2002 (S.I. 2002/3019), regs. 1(2)(b), **23(a)**
- F26** Words in reg. 1(2) inserted (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(2)(b)**
- F27** Words in reg. 1(2) inserted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by The Social Security (Miscellaneous Amendments) (No. 4) Regulations 2009 (S.I. 2009/2655), regs. 1(2)(c), **5(2)**
- F28** Words in reg. 1(2) inserted (29.10.2013) by The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2013 (S.I. 2013/2536), regs. 1(1), **10(2)(b)**
- F29** Words in reg. 1(2) inserted (4.10.2004) by The Social Security (Housing Benefit, Council Tax Benefit, State Pension Credit and Miscellaneous Amendments) Regulations 2004 (S.I. 2004/2327), regs. 1(1)(a), **7(2)**
- F30** Words in reg. 1(2) inserted (6.4.2010) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2010 (S.I. 2010/641), regs. 1(1), **6(2)**
- F31** Words in reg. 1(2) inserted (6.4.2006) by The Social Security (Deferral of Retirement Pensions, Shared Additional Pension and Graduated Retirement Benefit) (Miscellaneous Provisions) Regulations 2005 (S.I. 2005/2677), regs. 1(1), **13(2)**
- F32** Words in reg. 1(2) substituted (9.7.2023) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/640), regs. 1(1), **4(2)(a)**
- F33** Words in reg. 1(2) inserted (17.11.2008) by The Social Security (Miscellaneous Amendments) (No.6) Regulations 2008 (S.I. 2008/2767), regs. 1(2), **5(2)(b)**
- F34** Words in reg. 1(2) inserted (9.7.2023) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/640), regs. 1(1), **4(2)(b)**

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- F35** Words in reg. 1(2) inserted (29.4.2013) by The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013 (S.I. 2013/630), regs. 1(2), **33(2)(b)**
- F36** Words in reg. 1(2) inserted (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(2)(c)**
- F37** Words in reg. 1(2) substituted (1.10.2010) by The Health and Social Care Act 2008 (Miscellaneous Consequential Amendments) Order 2010 (S.I. 2010/1881), arts. 1(1), **12**
- F38** Words in reg. 1(2) substituted (28.10.2011) by The Public Services Reform (Scotland) Act 2010 (Consequential Modifications of Enactments) Order 2011 (S.I. 2011/2581), art. 1(2)(b), **Sch. 2 para. 35(b)**
- F39** Words in reg. 1(2) omitted (17.11.2008) by virtue of The Social Security (Miscellaneous Amendments) (No.6) Regulations 2008 (S.I. 2008/2767), regs. 1(2), **5(2)(a)(i)**
- F40** Words in reg. 1(2) inserted (1.10.2007) by The Independent Living Fund (2006) Order 2007 (S.I. 2007/2538), arts. 1, **6(2)**
- F41** Words in reg. 1(2) omitted (17.11.2008) by virtue of The Social Security (Miscellaneous Amendments) (No.6) Regulations 2008 (S.I. 2008/2767), regs. 1(2), **5(2)(a)(ii)**
- F42** Words in reg. 1(2) omitted (17.11.2008) by virtue of The Social Security (Miscellaneous Amendments) (No.6) Regulations 2008 (S.I. 2008/2767), regs. 1(2), **5(2)(a)(iii)**
- F43** Words in reg. 1(2) omitted (17.11.2008) by virtue of The Social Security (Miscellaneous Amendments) (No.6) Regulations 2008 (S.I. 2008/2767), regs. 1(2), **5(2)(a)(iv)**
- F44** Words in reg. 1(2) inserted (2.4.2013) by The Social Security (Miscellaneous Amendments) Regulations 2013 (S.I. 2013/443), regs. 1, **6(2)**
- F45** Words in reg. 1(2) inserted (12.12.2005) by The Income-related Benefits (Amendment) (No. 2) Regulations 2005 (S.I. 2005/3391), regs. 1, **7(2)(a)**
- F46** Words in reg. 1(2) inserted (19.6.2017) by The Social Security (Emergency Funds) (Amendment) Regulations 2017 (S.I. 2017/689), regs. 1, **4(2)(a)**
- F47** Words in reg. 1(2) inserted (3.4.2017) by The Employment and Support Allowance and Universal Credit (Miscellaneous Amendments and Transitional and Savings Provisions) Regulations 2017 (S.I. 2017/204), reg. 1, **Sch. 1 para. 5(2)** (with Sch. 2 paras. 1-7)
- F48** Words in reg. 1(2) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(2)(a)**
- F49** Words in reg. 1(2) inserted (6.4.2020) by The Parental Bereavement Leave and Pay (Consequential Amendments to Subordinate Legislation) Regulations 2020 (S.I. 2020/354), regs. 1, **10(2)**
- F50** Words in reg. 1(2) substituted (1.4.2012) by The Social Security (Miscellaneous Amendments) Regulations 2012 (S.I. 2012/757), regs. 1(4), **5(2)**
- F51** Word in reg. 1(2) omitted (5.4.2015) by virtue of The Shared Parental Leave and Statutory Shared Parental Pay (Consequential Amendments to Subordinate Legislation) Order 2014 (S.I. 2014/3255), arts. 1(3), **10(2)(a)(i)** (with art. 35(1))
- F52** Words in reg. 1(2) omitted (5.4.2015) by virtue of The Shared Parental Leave and Statutory Shared Parental Pay (Consequential Amendments to Subordinate Legislation) Order 2014 (S.I. 2014/3255), arts. 1(3), **10(2)(a)(ii)** (with art. 35(1))
- F53** Words in reg. 1(2) substituted (10.4.2006) by The Social Security (Hospital In-Patients) Regulations 2005 (S.I. 2005/3360), regs. 1(a), **8(2)**
- F54** Words in reg. 1(2) inserted (1.10.2007) by The Social Security (Miscellaneous Amendments) (No. 5) Regulations 2007 (S.I. 2007/2618), regs. 1(1), **10(2)**
- F55** Words in reg. 1(2) substituted (5.10.2005) (S) by The Mental Health (Care and Treatment) (Scotland) Act 2003 (Modification of Subordinate Legislation) Order 2005 (S.S.I. 2005/445), arts. 1, 2, **sch. para. 35(1)**; (5.10.2005) (E+W+N.I.) by The Mental Health (Care and Treatment) (Scotland) Act 2003 (Consequential Provisions) Order 2005 (S.I. 2005/2078), art. 1(1), **Sch. 2 para. 22(2)**
- F56** Words in reg. 1(2) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(2)(b)(i)**
- F57** Words in reg. 1(2) inserted (1.1.2022) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2021 (S.I. 2021/1405), regs. 1, **4(2)(b)**

- F58** Words in reg. 1(2) substituted (9.7.2023) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/640), regs. 1(1), **4(2)(c)**
- F59** Words in reg. 1(2) substituted (12.5.2004) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2004 (S.I. 2004/1141), regs. 1(1), **2(a)**
- F60** Words in reg. 1(2) inserted (6.4.2010) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2010 (S.I. 2010/641), regs. 1(1), **6(3)(a)**
- F61** Words in reg. 1(2) substituted (12.12.2005) by The Income-related Benefits (Amendment) (No. 2) Regulations 2005 (S.I. 2005/3391), regs. 1, **7(2)(b)**
- F62** Words in reg. 1(2) inserted (31.10.2011) by The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2011 (S.I. 2011/2425), regs. 1(2), **15(2)(b)**
- F63** Words in reg. 1(2) inserted (3.4.2017) by The Social Security (Scottish Infected Blood Support Scheme) Regulations 2017 (S.I. 2017/329), regs. 1, **5(2)(a)**
- F64** Words in reg. 1(2) inserted (23.10.2017) by The Social Security (Infected Blood and Thalidomide) Regulations 2017 (S.I. 2017/870), regs. 1, **5(2)(b)**
- F65** Words in reg. 1(2) inserted (19.6.2017) by The Social Security (Emergency Funds) (Amendment) Regulations 2017 (S.I. 2017/689), regs. 1, **4(2)(b)**
- F66** Words in reg. 1(2) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(2)(b)(ii)**
- F67** Words in reg. 1(2) inserted (27.10.2023) by The Social Security (Habitual Residence and Past Presence, and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/1144), regs. 1(1), **5(2)(a)**
- F68** Words in reg. 1(2) inserted (3.4.2017) by The Social Security (Scottish Infected Blood Support Scheme) Regulations 2017 (S.I. 2017/329), regs. 1, **5(2)(b)**
- F69** Words in reg. 1(2) omitted (28.4.2014) by virtue of The Social Security (Miscellaneous Amendments) Regulations 2014 (S.I. 2014/591), regs. 1, **7(2)(a)**
- F70** Words in reg. 1(2) inserted (31.12.2014) by The Shared Parental Leave and Statutory Shared Parental Pay (Consequential Amendments to Subordinate Legislation) Order 2014 (S.I. 2014/3255), arts. 1(2), **10(2)(b)**
- F71** Words in reg. 1(2) inserted (12.5.2004) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2004 (S.I. 2004/1141), regs. 1(1), **2(b)(iv)**
- F72** Words in reg. 1 inserted (8.6.2024) by The Social Security (State Pension Age Claimants: Closure of Tax Credits) (Amendment) Regulations 2024 (S.I. 2024/611), regs. 1(1), **4(2)**
- F73** Words in reg. 1(2) inserted (29.4.2013) by The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013 (S.I. 2013/630), regs. 1(2), **33(2)(c)**
- F74** Words in reg. 1(2) inserted (27.10.2023) by The Social Security (Habitual Residence and Past Presence, and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/1144), regs. 1(1), **5(2)(b)**
- F75** Words in reg. 1(2) inserted (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 1(b)**
- F76** Words in reg. 1(2) inserted (19.6.2017) by The Social Security (Emergency Funds) (Amendment) Regulations 2017 (S.I. 2017/689), regs. 1, **4(2)(c)**
- F77** Words in reg. 1(2) added (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(2)(d)**
- F78** Words in reg. 1(3) substituted (5.12.2005) by The Civil Partnership (Pensions, Social Security and Child Support) (Consequential, etc. Provisions) Order 2005 (S.I. 2005/2877), art. 1, **Sch. 3 para. 35(2)(b)** (with art. 3)
- F79** Reg. 1(3A) inserted (28.4.2014) by The Social Security (Miscellaneous Amendments) Regulations 2014 (S.I. 2014/591), regs. 1, **7(2)(b)**
- F80** Reg. 1(3A)(ab) inserted (23.2.2015) by The Social Security (Miscellaneous Amendments) Regulations 2015 (S.I. 2015/67), regs. 1, **2(1)(2)(a)**
- F81** Words in reg. 1(3A)(b) substituted (23.2.2015) by The Social Security (Miscellaneous Amendments) Regulations 2015 (S.I. 2015/67), regs. 1, **2(1)(2)(b)**

Marginal Citations

M4 1992 c. 4.

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the State Pension Credit Regulations 2002. (See end of Document for details)

- M5** S.I.1983/686; the relevant amending Instruments are S.I. 1983/1164 and 1984/1675.
- M6** 2000 c. 14.
- M7** S.I. 1987/1968; the relevant amending Instrument is S.I.1999/3108.
- M8** S.I. 1987/1967.
- M9** 1952 c. 52.
- M10** 1989 c. 45.
- M11** 1983 c. 20.
- M12** 1995 c. 46.
- M13** 1991 c. 56.
- M14** 1992 c. 14.

[^{F82}Disapplication of section 1(1A) of the Social Security Administration Act

1A. Section 1(1A) of the Social Security Administration Act 1992 (requirement to state a national insurance number) shall not apply to a person who—

- (a) is a person in respect of whom a claim for state pension credit is made;
- (b) is subject to immigration control within the meaning of section 115(9)(a) of the Immigration and Asylum Act 1999;
- (c) does not satisfy the conditions of entitlement to state pension credit as specified in section 1(2); and
- (d) has not previously been allocated a national insurance number.]

Textual Amendments

- F82** Reg. 1A inserted (6.4.2009) by The Social Security (National Insurance Number Information: Exemption) Regulations 2009 (S.I. 2009/471), regs. 1, 8

PART II

Entitlement and amount

[^{F83} Persons not in Great Britain

2.—(1) A person is to be treated as not in Great Britain if, subject to the following provisions of this regulation, he is not habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland.

(2) No person shall be treated as habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland unless he has a right to reside in (as the case may be) the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland other than a right to reside which falls within paragraph (3) [^{F84}or (3A)].

(3) A right to reside falls within this paragraph if it is one which exists by virtue of, or in accordance with, one or more of the following—

- (a) regulation 13 of the [^{F85}Immigration (European Economic Area) Regulations 2016];
- (b) regulation 14 of those Regulations, but only in a case where the right exists under that regulation because the person is—
 - (i) a jobseeker for the purpose of the definition of “qualified person” in regulation 6(1) of those Regulations, or

- (ii) a family member (within the meaning of regulation 7 of those Regulations) of such a jobseeker; ^{F86}or]
 - (bb) ^{F87}regulation 16 of those Regulations, but only in a case where the right exists under that regulation because the person satisfies the criteria in paragraph (5) of that regulation;]
 - ^{F88}(c)
 - ^{F88}(d)
 - ^{F88}(e)
- ^{F89}(3A) A right to reside falls within this paragraph if it exists by virtue of a person having been granted limited leave to enter, or remain in, the United Kingdom under the Immigration Act 1971 by virtue of—
- (a) Appendix EU to the immigration rules made under section 3(2) of that Act; ^{F90}...
 - (b) being a person with a Zambrano right to reside as defined in Annex 1 of Appendix EU to the immigration rules made under section 3(2) of that Act ^{F91}; or
 - (c) having arrived in the United Kingdom with an entry clearance that was granted under Appendix EU (Family Permit) to the immigration rules made under section 3(2) of that Act.]
- ^{F92}(3B) Paragraph (3A)(a) does not apply to a person who—
- (a) has a right to reside granted by virtue of being a family member of a relevant person of Northern Ireland; and
 - (b) would have a right to reside under the Immigration (European Economic Area) Regulations 2016 if the relevant person of Northern Ireland were an EEA national, provided that the right to reside does not fall within paragraph (3).]
- (4) A person is not to be treated as not in Great Britain if he is—
- ^{F93}(zza) a person granted leave in accordance with the immigration rules made under section 3(2) of the Immigration Act 1971, where such leave is granted by virtue of—
 - (i) the Afghan Relocations and Assistance Policy; or
 - (ii) the previous scheme for locally-employed staff in Afghanistan (sometimes referred to as the ex-gratia scheme);
 - (zzb) a person in Great Britain not coming within sub-paragraph (zza) or ^{F94}(h)] who left Afghanistan in connection with the collapse of the Afghan government that took place on 15th August 2021;]
 - ^{F95}(zzc) a person in Great Britain who was residing in Ukraine immediately before 1st January 2022, left Ukraine in connection with the Russian invasion which took place on 24th February 2022 and—
 - (i) has been granted leave in accordance with immigration rules made under section 3(2) of the Immigration Act 1971; ^{F96}...
 - (ii) has a right of abode in the United Kingdom within the meaning given in section 2 of that Act; ^{F97}or]
 - [does not require leave to enter or remain in the United Kingdom in accordance with ^{F98}(iii) section 3ZA of that Act;]
 - ^{F99}(zzd) a person who was residing in Sudan before 15th April 2023, left Sudan in connection with the violence which rapidly escalated on 15th April 2023 in Khartoum and across Sudan and—

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- (i) has been granted leave in accordance with immigration rules made under section 3(2) of the Immigration Act 1971;
 - (ii) has a right of abode in the United Kingdom within the meaning given in section 2 of that Act; or
 - (iii) does not require leave to enter or remain in the United Kingdom in accordance with section 3ZA of that Act;]
- [^{F100}(zze) a person who was residing in Israel, the West Bank, the Gaza Strip, East Jerusalem, the Golan Heights or Lebanon immediately before 7th October 2023, who left Israel, the West Bank, the Gaza Strip, East Jerusalem, the Golan Heights or Lebanon in connection with the Hamas terrorist attack in Israel on 7th October 2023 or the violence which rapidly escalated in the region following the attack and—
- (i) has been granted leave in accordance with immigration rules made under section 3(2) of the Immigration Act 1971;
 - (ii) has a right of abode in the United Kingdom within the meaning given in section 2 of that Act; or
 - (iii) does not require leave to enter or remain in the United Kingdom in accordance with section 3ZA of that Act;]
- [^{F101}(za) a qualified person for the purposes of regulation 6 of the [^{F102}Immigration (European Economic Area) Regulations 2016] as a worker or a self-employed person;
- (zb) a family member of a person referred to in sub-paragraph (za) ^{F103} ...;
- (zc) a person who has a right to reside permanently in the United Kingdom by virtue of regulation 15(1)(c), (d) or (e) of those Regulations;]
- [^{F104}(zd) a family member of a relevant person of Northern Ireland, with a right to reside which falls within paragraph (3A)(a), provided that the relevant person of Northern Ireland falls within sub-paragraph (za), or would do so but for the fact that they are not an EEA national;]
- [^{F105}(ze) a frontier worker within the meaning of regulation 3 of the Citizens’ Rights (Frontier Workers) (EU Exit) Regulations 2020;
- (zf) a family member of a person referred to in sub-paragraph (ze), who has been granted limited leave to enter, or remain in, the United Kingdom by virtue of Appendix EU to the immigration rules made under section 3(2) of the Immigration Act 1971;]
- ^{F101}(a)
- ^{F101}(b)
- ^{F101}(c)
- ^{F101}(d)
- ^{F101}(e)
- ^{F101}(f)
- (g) a refugee within the definition in Article 1 of the Convention relating to the Status of Refugees done at Geneva on 28th July 1951, as extended by Article 1(2) of the Protocol relating to the Status of Refugees done at New York on 31st January 1967;
- [^{F106}(h) a person who has been granted leave or who is deemed to have been granted leave outside the rules made under section 3(2) of the Immigration Act 1971 ^{F107} ...]
- [^{F108}(hh) a person who has humanitarian protection granted under those rules; [^{F109}or]]
- (i) a person who is not a person subject to immigration control within the meaning of section 115(9) of the Immigration and Asylum Act 1999 and who is in the United Kingdom

as a result of his deportation, expulsion or other removal by compulsion of law from another country to the United Kingdom;]^{F110} ...

^{F111}(j)

^{F111}(k)

[^{F112}(5) In this regulation—

“*EEA national*” has the meaning given in regulation 2(1) of the Immigration (European Economic Area) Regulations 2016;

“*family member*” has the meaning given in regulation 7(1)(a), (b) or (c) of the Immigration (European Economic Area) Regulations 2016 except that regulation 7(4) of those Regulations does not apply for the purposes of paragraphs (3B) and (4)(zd);

“*relevant person of Northern Ireland*” has the meaning given in Annex 1 of Appendix EU to the immigration rules made under section 3(2) of the Immigration Act 1971.]

[^{F113}(6) In this regulation references to the Immigration (European Economic Area) Regulations 2016 are to be read with Schedule 4 to the Immigration and Social Security Co-ordination (EU Withdrawal) Act 2020(Consequential, Saving, Transitional and Transitory Provisions) Regulations 2020.]

Textual Amendments

- F83** Reg. 2 substituted (30.4.2006) by [The Social Security \(Persons from Abroad\) Amendment Regulations 2006 \(S.I. 2006/1026\)](#), regs. 1, **9(2)** (with reg. 11(2))
- F84** Words in reg. 2(2) inserted (7.5.2019) by [The Social Security \(Income-related Benefits\) \(Updating and Amendment\) \(EU Exit\) Regulations 2019 \(S.I. 2019/872\)](#), regs. 1, **4(2)(a)**
- F85** Words in reg. 2(3)(a) substituted (7.5.2019) by [The Social Security \(Income-related Benefits\) \(Updating and Amendment\) \(EU Exit\) Regulations 2019 \(S.I. 2019/872\)](#), regs. 1, **4(2)(b)**
- F86** Word in reg. 2(3)(b)(ii) inserted (31.12.2020) by [The Immigration and Social Security Co-ordination \(EU Withdrawal\) Act 2020 \(Consequential, Saving, Transitional and Transitory Provisions\) \(EU Exit\) Regulations 2020 \(S.I. 2020/1309\)](#), regs. 1(2), **59(2)(a)(i)**
- F87** Reg. 2(3)(bb) substituted (7.5.2019) by [The Social Security \(Income-related Benefits\) \(Updating and Amendment\) \(EU Exit\) Regulations 2019 \(S.I. 2019/872\)](#), regs. 1, **4(2)(c)**
- F88** Reg. 2(3)(c)-(e) omitted (31.12.2020) by virtue of [The Immigration and Social Security Co-ordination \(EU Withdrawal\) Act 2020 \(Consequential, Saving, Transitional and Transitory Provisions\) \(EU Exit\) Regulations 2020 \(S.I. 2020/1309\)](#), regs. 1(2), **59(2)(a)(ii)**
- F89** Reg. 2(3A) inserted (7.5.2019) by [The Social Security \(Income-related Benefits\) \(Updating and Amendment\) \(EU Exit\) Regulations 2019 \(S.I. 2019/872\)](#), regs. 1, **4(2)(d)**
- F90** Word in reg. 2(3A)(a) omitted (31.12.2020 immediately after IP completion day) by virtue of [The Immigration \(Citizens' Rights etc.\) \(EU Exit\) Regulations 2020 \(S.I. 2020/1372\)](#), regs. 1(2)(a)(3)(d), **13(2)(a)**
- F91** Reg. 2(3A)(c) and word inserted (31.12.2020 immediately after IP completion day) by [The Immigration \(Citizens' Rights etc.\) \(EU Exit\) Regulations 2020 \(S.I. 2020/1372\)](#), regs. 1(2)(a)(3)(d), **13(2)(b)**
- F92** Reg. 2(3B) inserted (24.8.2020) by [The Social Security \(Income-Related Benefits\) \(Persons of Northern Ireland - Family Members\) \(Amendment\) Regulations 2020 \(S.I. 2020/683\)](#), regs. 1, **4(2)(a)**
- F93** Reg. 2(4)(zza)(zzb) inserted (16.9.2021) by [The Social Security \(Habitual Residence and Past Presence\) \(Amendment\) Regulations 2021 \(S.I. 2021/1034\)](#), regs. 1(1), **2(2)(4)**
- F94** Word in reg. 2(4)(zzb) substituted (22.3.2022) by [The Social Security \(Habitual Residence and Past Presence\) \(Amendment\) Regulations 2022 \(S.I. 2022/344\)](#), regs. 1(1), **2(2)(5)(c)**
- F95** Reg. 2(4)(zzc) inserted (22.3.2022) by [The Social Security \(Habitual Residence and Past Presence\) \(Amendment\) Regulations 2022 \(S.I. 2022/344\)](#), regs. 1(1), **2(3)(5)(c)**

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Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- F96** Word in reg. 2(4)(zcc)(i) omitted (18.10.2022) by virtue of The Social Security (Habitual Residence and Past Presence) (Amendment) (No. 2) Regulations 2022 (S.I. 2022/990), regs. 1(1), **2(1)(a)(2)(c)**
- F97** Word in reg. 2(4)(zcc)(ii) inserted (18.10.2022) by The Social Security (Habitual Residence and Past Presence) (Amendment) (No. 2) Regulations 2022 (S.I. 2022/990), regs. 1(1), **2(1)(b)(2)(c)**
- F98** Reg. 2(4)(zcc)(iii) inserted (18.10.2022) by The Social Security (Habitual Residence and Past Presence) (Amendment) (No. 2) Regulations 2022 (S.I. 2022/990), regs. 1(1), **2(1)(c)(2)(c)**
- F99** Reg. 2(4)(zcd) inserted (15.5.2023) by The Social Security (Habitual Residence and Past Presence) (Amendment) Regulations 2023 (S.I. 2023/532), regs. 1(1), **2(1)(2)(c)**
- F100** Reg. 2(4)(zce) inserted (27.10.2023) by The Social Security (Habitual Residence and Past Presence, and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/1144), regs. 1(1), **2(1)(2)(c)**
- F101** Reg. 2(4)(za)-(zc) substituted for reg. 2(4)(a)-(f) (31.5.2014) by The Social Security (Habitual Residence) (Amendment) Regulations 2014 (S.I. 2014/902), regs. 1, **4**
- F102** Words in reg. 2(4)(za) substituted (7.5.2019) by The Social Security (Income-related Benefits) (Updating and Amendment) (EU Exit) Regulations 2019 (S.I. 2019/872), regs. 1, **4(2)(e)**
- F103** Words in reg. 2(4)(zb) omitted (24.8.2020) by virtue of The Social Security (Income-Related Benefits) (Persons of Northern Ireland - Family Members) (Amendment) Regulations 2020 (S.I. 2020/683), regs. 1, **4(2)(b)**
- F104** Reg. 2(4)(zd) inserted (24.8.2020) by The Social Security (Income-Related Benefits) (Persons of Northern Ireland - Family Members) (Amendment) Regulations 2020 (S.I. 2020/683), regs. 1, **4(2)(c)**
- F105** Reg. 2(4)(ze)(zf) inserted (31.12.2020) by The Immigration and Social Security Co-ordination (EU Withdrawal) Act 2020 (Consequential, Saving, Transitional and Transitory Provisions) (EU Exit) Regulations 2020 (S.I. 2020/1309), regs. 1(2), **59(2)(b)**
- F106** Reg. 2(4)(h) substituted (29.10.2013) by The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2013 (S.I. 2013/2536), regs. 1(1), **10(3)(a)**
- F107** Words in reg. 2(4)(h) omitted (22.3.2022) by virtue of The Social Security (Habitual Residence and Past Presence) (Amendment) Regulations 2022 (S.I. 2022/344), regs. 1(1), **2(4)(5)(c)**
- F108** Reg. 2(4)(h)(hh) substituted for reg. 2(4)(h) (9.10.2006) by The Social Security (Persons from Abroad) Amendment (No. 2) Regulations 2006 (S.I. 2006/2528), regs. 1, **4(2)**
- F109** Word in reg. 2(4)(hh) added (29.10.2013) by The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2013 (S.I. 2013/2536), regs. 1(1), **10(3)(b)**
- F110** Word in reg. 2(4)(i) omitted (18.3.2009) by virtue of The Social Security (Habitual Residence) (Amendment) Regulations 2009 (S.I. 2009/362), regs. 1(2), **4(2)**
- F111** Reg. 2(4)(j)(k) omitted (29.10.2013) by virtue of The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2013 (S.I. 2013/2536), regs. 1(1), **10(3)(c)**
- F112** Reg. 2(5) inserted (24.8.2020) by The Social Security (Income-Related Benefits) (Persons of Northern Ireland - Family Members) (Amendment) Regulations 2020 (S.I. 2020/683), regs. 1, **4(2)(d)**
- F113** Reg. 2(6) inserted (31.12.2020) by The Immigration and Social Security Co-ordination (EU Withdrawal) Act 2020 (Consequential, Saving, Transitional and Transitory Provisions) (EU Exit) Regulations 2020 (S.I. 2020/1309), regs. 1(2), **59(2)(c)**

Modifications etc. (not altering text)

- C4** Reg. 2 applied (with modifications) (31.12.2020) by The Citizens' Rights (Application Deadline and Temporary Protection) (EU Exit) Regulations 2020 (S.I. 2020/1209), regs. 1(1), **3(3)**, 4(4), 11(e)
- C5** Reg. 2(4)(a)-(e) applied (with modifications) (30.4.2006) by The Social Security (Persons from Abroad) Amendment Regulations 2006 (S.I. 2006/1026), regs. 1, **10(h)** (with reg. 11(2))

[F114] Persons temporarily absent from Great Britain

3.—(1) A claimant's entitlement to state pension credit while the claimant is temporarily absent from Great Britain is to continue but for no longer than—

- (a) 4 weeks, provided the absence is not expected to exceed 4 weeks;
- (b) 8 weeks, where paragraph (2) applies; or

(c) 26 weeks, where paragraph (3) applies,
provided the claimant continues to satisfy the other conditions of entitlement.

(2) This paragraph applies where the absence is not expected to exceed 8 weeks and is in connection with the death of—

- (a) the claimant's partner or a child or qualifying young person normally living with the claimant; or
- (b) a close relative of—
 - (i) the claimant;
 - (ii) the claimant's partner; or
 - (iii) a child or qualifying young person normally living with the claimant,

and the Secretary of State considers that it would be unreasonable to expect the claimant to return to Great Britain within 4 weeks.

(3) This paragraph applies where the absence is not expected to exceed 26 weeks and is solely in connection with—

- (a) the claimant undergoing—
 - (i) treatment for an illness or physical or mental impairment by, or under the supervision of, a qualified practitioner; or
 - (ii) medically approved convalescence or care as a result of treatment for an illness or physical or mental impairment, where the claimant had that illness or impairment before leaving Great Britain; or
- (b) the claimant accompanying his or her partner or a child or qualifying young person normally living with the claimant for treatment or convalescence or care as mentioned in sub-paragraph (a).

(4) In this regulation and in regulation 5—

“medically approved” means certified by a registered medical practitioner;

“qualified practitioner” means a person qualified to provide medical treatment, physiotherapy or a form of treatment which is similar to, or related to, either of those forms of treatment.]

Textual Amendments

F114 Reg. 3 substituted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(2)** (with reg. 5(3))

Persons temporarily absent from Great Britain on 6th October 2008

^{F115}**3A.**

Textual Amendments

F115 Reg. 3A omitted (28.7.2016) by virtue of [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(3)** (with reg. 5(3))

Persons receiving treatment outside Great Britain

^{F116}**4.**

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

Textual Amendments

F116 Reg. 4 omitted (28.7.2016) by virtue of [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(4)** (with reg. 5(3))

[^{F117}Meaning of “qualifying young person”

4A.—(1) A person who has reached the age of 16 but not the age of 20 is a qualifying young person for the purposes of these Regulations—

- (a) up to, but not including, the 1st September following the person's 16th birthday; and
- (b) up to, but not including, the 1st September following the person's 19th birthday, if the person is enrolled on, or accepted for, approved training or a course of education—
 - (i) which is not a course of advanced education within the meaning of regulation 12(3) of the Universal Credit Regulations 2013;
 - (ii) which is provided at a school or college or provided elsewhere but approved by the Secretary of State for the purposes of regulation 5 of the Universal Credit Regulations 2013; and
 - (iii) where the average time spent during term time in receiving tuition, engaging in practical work or supervised study or taking examinations exceeds 12 hours per week.

(2) Where the young person is aged 19, he or she must have started the education or training or been enrolled on or accepted for it before reaching that age.

(3) The education or training referred to in paragraph (1) does not include education or training provided by means of a contract of employment.

(4) “Approved training” means training in pursuance of arrangements made under section 2(1) of the Employment and Training Act 1973 or section 2(3) of the Enterprise and New Towns (Scotland) Act 1990 which is approved by the Secretary of State for the purposes of regulation 5 of the Universal Credit Regulations 2013.

(5) A person who is receiving universal credit, a contributory employment and support allowance, a contribution-based jobseeker's allowance, an income-related employment and support allowance, an income-based jobseeker's allowance or income support is not a qualifying young person.]

Textual Amendments

F117 Reg. 4A inserted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(5)** (with reg. 5(3))

Persons treated as being or not being members of the same household

5.—(1) A person is to be treated as not being a member of the same household as the claimant if—

- (a) he is living away from the claimant and—
 - (i) he does not intend to resume living with the claimant; or
 - (ii) his absence is likely to exceed 52 weeks except where there are exceptional circumstances (for example the person is in hospital or otherwise has no control over the length of his absence), and the absence is unlikely to be substantially more than 52 weeks;

- (b) he or the claimant is permanently in a care home ^{F118}or an independent hospital];
- (c) he or the claimant is, or both are—
 - (i) detained in a hospital provided under the provisions of the Mental Health Act 1983, the ^{F119}Mental Health (Care and Treatment) (Scotland) Act 2003], or the Criminal Procedure (Scotland) Act 1995; or
 - (ii) detained in custody pending trial or sentence upon conviction or under a sentence imposed by a court; or
 - (iii) on temporary release in accordance with the provisions of ^{F120}the Prison Act 1952 ^{M15} or] the Prison (Scotland) Act 1989^{M16};
- (d) the claimant is abroad and does not satisfy ^{F121}... regulation 3 (persons ^{F122}temporarily absent from Great Britain).

^{F123}(e)

^{F124}(f) except in circumstances where paragraph (1A) applies, he is absent from Great Britain;]

^{F125}(g)

^{F126}(h) he is a person subject to immigration control within the meaning of section 115(9) of the Immigration and Asylum Act 1999]

^{F127}(1A) A person is to be treated as being a member of the same household as the claimant while he is absent from Great Britain but for no longer than—

- (a) 4 weeks, provided the absence is not expected to exceed 4 weeks;
- (b) 8 weeks, where paragraph (1B) applies; or
- (c) 26 weeks, where paragraph (1C) applies.]

^{F127}(1B) This paragraph applies where the absence is not expected to exceed 8 weeks and is in connection with the death of—

- (a) a child or qualifying young person normally living with the person; or
- (b) a close relative of—
 - (i) the person;
 - (ii) the person's partner; or
 - (iii) a child or qualifying young person normally living with the person,

and the Secretary of State considers that it would be unreasonable to expect the person to return to Great Britain within 4 weeks.

(1C) This paragraph applies where the absence is not expected to exceed 26 weeks and is solely in connection with—

- (a) the person undergoing—
 - (i) treatment for an illness or physical or mental impairment by, or under the supervision of, a qualified practitioner; or
 - (ii) medically approved convalescence or care as a result of treatment for an illness or physical or mental impairment, where the person had that illness or impairment before leaving Great Britain; or
- (b) the person accompanying his partner or a child or qualifying young person normally living with the person for treatment or convalescence or care as mentioned in sub-paragraph (a).]

(2) Subject to ^{F128}paragraphs (1) and (5)], partners shall be treated as members of the same household notwithstanding that they are temporarily living apart.

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

[^{F129}(3) Paragraph (5) applies where a claimant (“C”), who has attained the qualifying age, would otherwise not be entitled to either state pension credit or universal credit, because—

- (a) but for that paragraph, C would be a member of the same household as a partner who has not attained the qualifying age and therefore a member of a mixed-age couple excluded from state pension credit by virtue of section 4(1A), and
- (b) C is neither entitled to universal credit jointly with that partner, nor entitled to universal credit as a single person, in one of the cases set out in paragraph (4).

(4) The cases are where C is not entitled to universal credit because C has attained the qualifying age and—

- (a) any of the following paragraphs of regulation 3 of the Universal Credit Regulations 2013 (couples) applies, and in the case of paragraph (ii) below, one of the following circumstances applies—
 - (i) paragraph (3) (treatment of certain couples – universal credit may only be claimed as a single person);
 - (ii) paragraph (4) (treatment of polygamous marriages), so that C is not entitled to universal credit because C may only claim universal credit either as one of two parties to a polygamous marriage to be treated as a couple where the other party has also attained the qualifying age, or as a remaining party to such a marriage to be treated as single;
 - (iii) paragraph (6) (absence from the household – universal credit may only be claimed as a single person); or
- (b) C lost joint entitlement to universal credit as part of a mixed-age couple due to one of the following changes of circumstances taking effect from a date (namely the first day of the universal credit assessment period in which the change occurred) that is earlier than when, but for paragraph (5), the same change would take effect for the purposes of state pension credit, those changes being where—
 - (i) C and their partner are no longer a couple; or
 - (ii) C is party to a marriage that is no longer polygamous and C's remaining spouse has attained the qualifying age.

(5) Where this paragraph applies—

- (a) C and their partner, who are to be treated as a non-polygamous couple in accordance with sub-paragraph (a)(ii) of paragraph (4), or who are no longer parties to a polygamous marriage in accordance with sub-paragraph (b)(ii), are to be treated as members of the same household as each other but not of that of any party (or parties) with whom they are not part of a couple in accordance with those provisions; or
- (b) C, who is to be treated as single in accordance with sub-paragraph (a)(i) to (iii) of paragraph (4), or is single in accordance with sub-paragraph (b)(i), is to be treated as though C is not a member of the same household as any party (or parties) with whom C is not part of a couple in accordance with those provisions,

where paragraph (4)(a) applies, with effect from the date on which the relevant paragraph of regulation 3 of the Universal Credit Regulations 2013 first applies to C, or, where paragraph (4) (b) applies, with effect from the date referred to in paragraph (4)(b) on which C lost entitlement to universal credit.

(6) In this regulation—

- (a) in relation to universal credit entitlement, “assessment period” has the meaning prescribed by regulation 21 of the Universal Credit Regulations 2013;

- (b) “mixed-age”, in respect of a couple or a marriage, means where one member has attained the qualifying age and the other has not;
- (c) the definition in sub-paragraph (b) includes a polygamous marriage where at least one party to the marriage has attained the qualifying age and at least one has not; and
- (d) “polygamous marriage” means a marriage during which a party to it is married to more than one person and which took place under the laws of a country that permits polygamy.]

^{F130}(3)

Textual Amendments

- F118** Words in reg. 5(1)(b) inserted (24.10.2005) by [The Social Security \(Care Homes and Independent Hospitals\) Regulations 2005 \(S.I. 2005/2687\)](#), reg. 1, **Sch. 5 para. 2**
- F119** Words in reg. 5(1)(c)(i) substituted (S.) (5.10.2005) by [The Mental Health \(Care and Treatment\) \(Scotland\) Act 2003 \(Modification of Subordinate Legislation\) Order 2005 \(S.S.I. 2005/445\)](#), arts. 1, 2, **sch. para. 35(2)**; (5.10.2005) (E.W.N.I) by [The Mental Health \(Care and Treatment\) \(Scotland\) Act 2003 \(Consequential Provisions\) Order 2005 \(S.I. 2005/2078\)](#), art. 1(1), **Sch. 2 para. 22(3)**
- F120** Words in reg. 5(1)(c)(iii) omitted (temp.) (8.4.2020) by virtue of [The Social Security \(Coronavirus\) \(Prisoners\) Regulations 2020 \(S.I. 2020/409\)](#), regs. 1, **3(1)(b)** (with reg. 6(2)); (as amended (12.5.2021) by S.I. 2021/476, reg. 4(6))
- F121** Words in reg. 5(1)(d) omitted (6.10.2003) by virtue of [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(5)(b)**
- F122** Word in reg. 5(1)(d) substituted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(6)(a)** (with reg. 5(3))
- F123** Reg. 5(1)(e) omitted (2.10.2006) by virtue of [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2006 \(S.I. 2006/2378\)](#), regs. 1(3), **14(2)(a)**
- F124** Reg. 5(1)(f) substituted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(6)(b)** (with reg. 5(3))
- F125** Reg. 5(1)(g) omitted (6.10.2003) by virtue of [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(5)(e)**
- F126** Reg. 5(1)(g)(h) added (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 2**
- F127** Reg. 5(1A)-(1C) substituted for reg. 5(1A) (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(6)(c)** (with reg. 5(3))
- F128** Words in reg. 5(2) substituted (25.11.2020) by [The Universal Credit \(Persons who have attained state pension credit qualifying age\) \(Amendment\) Regulations 2020 \(S.I. 2020/655\)](#), regs. 1(2), **2(2)(a)**
- F129** Reg. 5(3)-(6) inserted (25.11.2020) by [The Universal Credit \(Persons who have attained state pension credit qualifying age\) \(Amendment\) Regulations 2020 \(S.I. 2020/655\)](#), regs. 1(2), **2(2)(b)**
- F130** Reg. 5(3) omitted (6.10.2008) by virtue of [The Social Security \(Miscellaneous Amendments\) \(No.4\) Regulations 2008 \(S.I. 2008/2424\)](#), regs. 1, **3(4)(b)**

Marginal Citations

- M15** 1952 c. 52.
- M16** 1989 c. 45.

Amount of the guarantee credit

6.—(1) Except as provided in the following provisions of these Regulations, the standard minimum guarantee is—

- (a) [^{F131}£332.95] per week in the case of a claimant who has a partner;

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- (b) [^{F132}£218.15] per week in the case of a claimant who has no partner.
- (2) Paragraph (3) applies in the case of—
- (a) prisoners; and
 - (b) members of religious orders who are fully maintained by their order.
- (3) In a case to which this paragraph applies—
- (a) section 2(3) has effect with the substitution for the reference to the standard minimum guarantee in section 2(3)(a) of a reference to a nil amount; and
 - (b) except in the case of a person who is a remand prisoner, nil is the prescribed additional amount for the purposes of section 2(3)(b).
- (4) Except in a case to which paragraph (3) applies, an amount additional to that prescribed in paragraph (1) shall be applicable under paragraph (5) if the claimant is treated as being a severely disabled person in accordance with paragraph 1 of Part I of Schedule I.
- (5) The additional amount applicable is—
- (a) except where paragraph (b) applies, [^{F133}£81.50] per week if paragraph 1(1)(a), (b) or (c) of Part I of Schedule I is satisfied; or
 - (b) [^{F134}£163.00] per week if paragraph 1(1)(b) of Part I of Schedule I is satisfied otherwise than by virtue of paragraph 1(2)(b) of that Part and no one is entitled to and in receipt of an allowance under section 70 of the 1992 Act [^{F135}or carer support payment][^{F136}, or has an award of universal credit which includes the carer element under regulation 29 of the Universal Credit Regulations 2013,] in respect of caring for either partner.
- (6) Except in a case to which paragraph (3) applies, an amount additional to that prescribed in paragraph (1) shall be applicable—
- (a) if paragraph 4 of Part II of Schedule I is satisfied (amount applicable for carers);
 - (b) in accordance with Part III of Schedule I (amount applicable for former claimants of income support or income-based jobseeker's allowance); ^{F137}...
 - (c) except where paragraph (7) applies, in accordance with Schedule II (housing costs) [^{F138}, ^{F139} ...]
 - ^{F140}(d) except where paragraph (11) applies, or entitlement ceases by virtue of paragraph (14), in accordance with Schedule IIA (additional amount applicable for claimants responsible for a child or qualifying young person)][^{F141}or
 - (e) in accordance with Schedule IIB (transitional protection on closure of tax credits).]
- (7) This paragraph applies in the case of a person who has been detained in custody for more than 52 weeks pending trial or sentence following conviction by a court.
- (8) The amount applicable if paragraph 4 of Part II of Schedule I is satisfied is [^{F142}£45.60] per week, and in the case of partners, this amount is applicable in respect of each partner who satisfies that paragraph.
- (9) In the case of a remand prisoner paragraph (6) shall apply as if sub-paragraphs (a) and (b) were omitted.
- (10) In this regulation, “remand prisoner” means a person who, for a period not exceeding 52 weeks, has been detained in custody on remand pending trial or, as a condition of bail, required to reside in a hostel approved under section 27(1) of the Probation Service Act 1993^{M17} or, as the case may be, detained pending sentence upon conviction.
- ^{F143}(11) This paragraph applies in the case of a person who is awarded, or who is treated as having an award of, a tax credit under the Tax Credits Act.

- (12) For the purposes of paragraph (11)—
- (a) a person is to be treated as having an award of a working tax credit with effect from the start of the current tax year even though a decision has not been made under section 14 of the Tax Credits Act in respect of a claim for that tax credit for that tax year, if the person was awarded a working tax credit for the previous tax year and any of the cases specified in paragraph (13) applies; and
 - (b) a person is to be treated as having an award of a child tax credit with effect from the start of the current tax year even though a decision has not been made under section 14 of the Tax Credits Act in respect of a claim for that tax credit for that tax year, if the person was awarded a child tax credit for the previous tax year and any of the cases specified in paragraph (13) applies.
- (13) The cases specified for the purposes of paragraph (12) are—
- (a) a final notice has not been given to the person under section 17 of the Tax Credits Act in respect of the previous tax year;
 - (b) a final notice has been given which includes provision by virtue of subsection (2) or (4) of section 17, or a combination of those subsections and subsection (6), and—
 - (i) the date specified in the notice for the purposes of section 17(2) and (4) or, where different dates are specified, the later of them has not passed and no claim for a tax credit for the current tax year has been made or treated as made; or
 - (ii) a claim for a tax credit has been made or treated as made on or before the date mentioned in paragraph (i), but no decision has been made in relation to that claim under section 14 of that Act; or
 - (c) a final notice has been given, no claim for a tax credit for the current tax year has been made or treated as made, and no decision has been made under section 18(1) of the Tax Credits Act in respect of an award of a tax credit for the previous tax year.
- (14) Entitlement to the additional amount specified in Schedule IIA ceases where a person is awarded a tax credit in the circumstances specified in paragraph (15) or (16).
- (15) The circumstances specified in this paragraph are—
- (a) the person was awarded a tax credit for the previous tax year which was not terminated by Her Majesty's Revenue and Customs under section 16 of the Tax Credits Act;
 - (b) a final notice has been given to the person under section 17 of the Tax Credits Act in respect of that tax year; and
 - (c) either—
 - (i) the person makes a declaration during the period of 30 days following the cessation of payment of a tax credit made under section 24(4) of the Tax Credits Act; or
 - (ii) the person makes a declaration after the end of the period of 30 days following the cessation of payment of a tax credit made under section 24(4) of the Tax Credits Act but before 31st January of the tax year following the period to which the notice relates, and, in the opinion of Her Majesty's Revenue and Customs, the person had good reason for not making the declaration by the date specified in paragraph (13)(b).
- (16) The circumstances specified in this paragraph are that a decision under section 14(1), 15(1), 16(1), 18(1), (5), (6) or (9), 19(3) or 20(1) or (4) of the Tax Credits Act is revised in favour of the claimant following—
- (a) a revision by virtue of section 21 of the Tax Credits Act;
 - (b) a request for a review under section 21A of the Tax Credits Act;
 - (c) an appeal under section 38 of the Tax Credits Act; or

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*Changes to legislation: There are currently no known outstanding effects for the
The State Pension Credit Regulations 2002. (See end of Document for details)*

(d) a revision, in any other circumstances, of a decision by Her Majesty's Revenue and Customs relating to an award of a tax credit under the Tax Credits Act.

(17) In this regulation—

“a tax credit” includes a child tax credit and a working tax credit;

“the Tax Credits Act” means the Tax Credits Act 2002;

“child tax credit” means a child tax credit under and by virtue of section 8 of the Tax Credits Act;

“working tax credit” means a working tax credit under and by virtue of section 10 of the Tax Credits Act and includes the child care element by virtue of section 12 of that Act.]

Textual Amendments

- F131** Sum in reg. 6(1)(a) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(2)(a)**
- F132** Sum in reg. 6(1)(b) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(2)(b)**
- F133** Sum in reg. 6(5)(a) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(2)(c)**
- F134** Sum in reg. 6(5)(b) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(2)(d)**
- F135** Words in reg. 6(5)(b) inserted (19.11.2023) by [The Carer's Assistance \(Carer Support Payment\) \(Scotland\) Regulations 2023 \(Consequential Amendments\) Order 2023 \(S.I. 2023/1218\)](#), arts. 1(2), **14(3)**
- F136** Words in reg. 6(5)(b) inserted (with effect in accordance with reg. 1(3) of the amending S.I.) by [The Universal Credit and Miscellaneous Amendments Regulations 2015 \(S.I. 2015/1754\)](#), regs. 1(1), **16(2)**
- F137** Word in reg. 6(6)(b) omitted (1.2.2019) by virtue of [The State Pension Credit \(Additional Amount for Child or Qualifying Young Person\) \(Amendment\) Regulations 2018 \(S.I. 2018/676\)](#), regs. 1, **2(2)(a)**
- F138** Word in reg. 6(6)(c) substituted (1.2.2019) by [The State Pension Credit \(Additional Amount for Child or Qualifying Young Person\) \(Amendment\) Regulations 2018 \(S.I. 2018/676\)](#), regs. 1, **2(2)(b)**
- F139** Word in reg. 6(c) omitted (8.6.2024) by virtue of [The Social Security \(State Pension Age Claimants: Closure of Tax Credits\) \(Amendment\) Regulations 2024 \(S.I. 2024/611\)](#), regs. 1(1), **4(3)**
- F140** Reg. 6(6)(d) added (1.2.2019) by [The State Pension Credit \(Additional Amount for Child or Qualifying Young Person\) \(Amendment\) Regulations 2018 \(S.I. 2018/676\)](#), regs. 1, **2(2)(c)**
- F141** Reg. 6(e) and word inserted (8.6.2024) by [The Social Security \(State Pension Age Claimants: Closure of Tax Credits\) \(Amendment\) Regulations 2024 \(S.I. 2024/611\)](#), regs. 1(1), **4(3)**
- F142** Sum in reg. 6(8) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(2)(e)**
- F143** Reg. 6(11)-(17) inserted (1.2.2019) by [The State Pension Credit \(Additional Amount for Child or Qualifying Young Person\) \(Amendment\) Regulations 2018 \(S.I. 2018/676\)](#), regs. 1, **2(3)**

Marginal Citations

M17 1993 c. 47.

Savings Credit

7.—(1) The percentage prescribed for the purposes of determining—

- (a) the maximum savings credit is 60 per cent.;
- (b) “amount A” in section 3(4) is 60 per cent.;
- (c) “amount B” in section 3(4) is 40 per cent.

(2) The amount prescribed for the savings credit threshold is [^{F144}£189.80] for a claimant who has no partner and [^{F144}£301.22] for a claimant who has a partner.

(3) The maximum savings credit shall be taken to be Nil in the case of—

- (a) prisoners; and
- (b) members of religious orders who are fully maintained by their order.

[^{F145}(4) If a calculation made for the purposes of paragraph (1)(b) or (c) results in a fraction of a penny, that fraction shall, if it would be to the claimant's advantage, be treated as a penny; otherwise it shall be disregarded.]

Textual Amendments

F144 Sums in reg. 7(2) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(3)**

F145 Reg. 7(4) added (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(d)**

[^{F146}Limitation of savings credit for certain mixed-age couples

7A. A person who is a member of a mixed-age couple, is not entitled to a savings credit unless one of the members of the couple—

- (a) has been awarded a savings credit with effect from a day before 6th April 2016 and was entitled to a savings credit immediately before 6th April 2016, and
- (b) remained entitled to a savings credit at all times since the beginning of 6th April 2016.]

Textual Amendments

F146 [Reg. 7A](#) inserted (6.4.2016) by [The State Pension Credit \(Amendment\) Regulations 2015 \(S.I. 2015/1529\)](#), regs. 1, **2(2)**

Special groups

8. Schedule III shall have effect in the case of members of polygamous marriages and [^{F147}persons serving a sentence of imprisonment detained in hospital].

Textual Amendments

F147 Words in reg. 8 substituted (25.3.2010) by [The Social Security \(Persons Serving a Sentence of Imprisonment Detained in Hospital\) Regulations 2010 \(S.I. 2010/442\)](#), regs. 1, **4(2)**

Qualifying income for the purposes of savings credit

9. For the purposes of section 3 (savings credit), all income is to be treated as qualifying income except the following which is not to be treated as qualifying income—

- (a) working tax credit;
- (b) incapacity benefit;
- (c) a contribution-based jobseeker's allowance^{F148} ...;
- (d) severe disablement allowance;

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- (e) maternity allowance;
- (f) payments referred to in regulation 15(5)(d) (maintenance payments).

[^{F149}(g) contributory employment and support allowance.]

Textual Amendments

F148 Words in reg. 9(c) omitted (29.4.2013) by virtue of [The Universal Credit \(Consequential, Supplementary, Incidental and Miscellaneous Provisions\) Regulations 2013 \(S.I. 2013/630\)](#), regs. 1(2), **33(3)**

F149 Reg. 9(g) added (27.10.2008) by [The Employment and Support Allowance \(Consequential Provisions\) \(No. 2\) Regulations 2008 \(S.I. 2008/1554\)](#), regs. 1(2)(b), **4(3)**

Assessed income period

10.—(1) For the purposes of section 6(2)(b) (circumstances in which the Secretary of State is prevented from specifying an assessed income period), the circumstances are—

- (a) in the case of partners, one partner is under the age of 60; or
- (b) state pension credit is awarded, or awarded at a higher rate, because an element of the claimant’s retirement provision which is due to be paid to the claimant stops temporarily.

[^{F150}(c) that—

- (i) the Secretary of State has sent the claimant the notification required by regulation 32(6)(a) of the Claims and Payments Regulations; and
- (ii) the claimant has not provided sufficient information to enable the Secretary of State to determine whether there will be any variation in the claimant’s retirement provision throughout the period of 12 months beginning with the day following the day on which the previous assessed income period ends.]

(2) The circumstances prescribed for the purposes of section 7(4) (circumstances in which assessed amounts are deemed not to change) are that—

[^{F151}(a) except where sub-paragraph (b) applies, the arrangements under which the assessed amount is paid contain no provision for periodic increases in the amount payable; or]

- (b) the assessed income comprises income from capital other than income to which paragraph (7) applies.

(3) Paragraphs (4) and (5) do not apply where the assessed amount comprises income from capital.

(4) Where the Secretary of State is informed that the arrangements under which the assessed amount is paid contains provision—

- (a) for the payment to be increased periodically;
- (b) for the date on which the increase is to be paid; and
- (c) for determining the amount of the increase,

the assessed amount shall be deemed to increase from the day specified in paragraph (5) by an amount determined by applying those provisions to the amount payable apart from this paragraph.

[^{F152}(5) The day referred to in this paragraph is—

- (a) in a case to which paragraph (5A) applies—
 - (i) where the first increased payment date is the day on which the benefit week begins, that day;

- (ii) where head (i) does not apply, the first day of the next benefit week which begins after that increased payment date;
- (b) in a case to which paragraph (5A) does not apply—
 - (i) where the second increased payment date is the day on which the benefit week begins, that day;
 - (ii) where head (i) does not apply, the first day of the next benefit week following that increased payment date.
- (5A) This paragraph applies where the period which—
 - (a) begins on the date from which the increase in the assessed amount is to accrue; and
 - (b) ends on the first increased payment date,
 is a period of the same length as the period in respect of which the last payment of the pre-increase assessed amount was made.

(5B) In paragraphs (5) and (5A)—
 “increased payment date” means a date on which the increase in the assessed amount referred to in paragraph (4) is paid as part of a periodic payment^{F153} ...; and
 “pre-increase assessed amount” means the assessed amount prior to that increase.]

- (6) Except where paragraph (4) applies, the assessed amount shall be deemed to increase—
 - [^{F154}(a) on the day in April each year on which increases under section 150(1)(c) of the Administration Act come into force if that is the first day of a benefit week but if it is not from the next following such day; and]
 - (b) by an amount produced by applying to the assessed amount the same percentage increase as that applied for the purposes of additional pensions under section 150(1)(c) and 151(1) of the Administration Act.
- (7) Where the assessed amount comprises income from capital, it shall be deemed to increase or decrease—
 - (a) on the first day of the next benefit week to commence [^{F155}on or after] the day on which the income increases or decreases; and
 - (b) by an amount equal to the change in the claimant’s income produced by applying to his income changes made to the yields capital is deemed to produce, or to the capital amounts, specified in regulation 15(6), or to both if both are changed.

^{F156}(8)

Textual Amendments

F150 Reg. 10(1)(c) added (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(6)**

F151 Reg. 10(2)(a) substituted (18.12.2005) by [The State Pension Credit \(Amendment\) Regulations 2005 \(S.I. 2005/3205\)](#), regs. 1, **2(2)(a)**

F152 Reg. 10(5)-(5B) substituted for reg. 10(5) (5.4.2004) by [The State Pension Credit \(Miscellaneous Amendments\) Regulations 2004 \(S.I. 2004/647\)](#), regs. 1, **3(2)**

F153 Words in reg. 10(5B) omitted (18.12.2005) by virtue of [The State Pension Credit \(Amendment\) Regulations 2005 \(S.I. 2005/3205\)](#), regs. 1, **2(2)(b)**

F154 Reg. 10(6)(a) substituted (5.4.2004) by [The State Pension Credit \(Miscellaneous Amendments\) Regulations 2004 \(S.I. 2004/647\)](#), regs. 1, **3(3)**

F155 Words in reg. 10(7)(a) substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(e)**

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the State Pension Credit Regulations 2002. (See end of Document for details)

F156 Reg. 10(8) omitted (2.10.2006) by virtue of [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2006 \(S.I. 2006/2378\)](#), regs. 1(3), **14(3)**

Retirement provision in assessed income period

11.—^{F157}(1) Where an element of a person's retirement provision ceases to be payable by one source but—

- (a) responsibility for that element is assumed by another source, income from both those sources shall be treated as income from the same source; or
- (b) in consequence of that element ceasing, income of a different description becomes payable from a different source, that income shall be treated as income of the same description from the same source as the element which ceased to be payable.

^{F158}(2) For the purposes of section 7(6) (meaning of retirement provision) of the Act, a foreign state retirement pension is to be treated as a benefit under the 1992 Act.]

Textual Amendments

F157 Reg. 11(1): reg. 11 renumbered as reg. 11(1) (13.4.2010) by [The Social Security \(Miscellaneous Amendments\) \(No. 2\) Regulations 2010 \(S.I. 2010/641\)](#), regs. 1(4)(c), **6(4)**

F158 Reg. 11(2) added (13.4.2010) by [The Social Security \(Miscellaneous Amendments\) \(No. 2\) Regulations 2010 \(S.I. 2010/641\)](#), regs. 1(4)(c), **6(4)**

End of assessed income period

12. An assessed income period shall end ^{F159}...—

- (a) ^{F160}at such time as] the claimant no longer satisfies a condition of entitlement to state pension credit;
- (b) ^{F161}at such time as] payments of an element of the claimant's retirement provision which is due to be paid to him stops temporarily or the amount paid is less than the amount due and in consequence his award of state pension credit is superseded under section 10 of the Social Security Act 1998^{M18};
- (c) ^{F162}at such time as] a claimant who has no partner is provided with accommodation in a care home ^{F163}or an independent hospital] other than on a temporary basis^{F164};
- ^{F164}(d) if, apart from this sub-paragraph, it would have ended on a date falling within the period specified in column 1 of the table in Schedule IIIA, on the corresponding date shown against that period in column 2 of that table]

Textual Amendments

F159 Words in reg. 12 omitted (6.4.2016) by virtue of [The State Pension Credit \(Amendment\) Regulations 2015 \(S.I. 2015/1529\)](#), regs. 1, **2(3)(a)**

F160 Words in reg. 12(a) inserted (6.4.2016) by [The State Pension Credit \(Amendment\) Regulations 2015 \(S.I. 2015/1529\)](#), regs. 1, **2(3)(b)**

F161 Words in reg. 12(b) inserted (6.4.2016) by [The State Pension Credit \(Amendment\) Regulations 2015 \(S.I. 2015/1529\)](#), regs. 1, **2(3)(b)**

F162 Words in reg. 12(c) inserted (6.4.2016) by [The State Pension Credit \(Amendment\) Regulations 2015 \(S.I. 2015/1529\)](#), regs. 1, **2(3)(b)**

F163 Words in reg. 12(c) inserted (24.10.2005) by The Social Security (Care Homes and Independent Hospitals) Regulations 2005 (S.I. 2005/2687), reg. 1, **Sch. 5 para. 3**

F164 Reg. 12(d) added (6.4.2016) by The State Pension Credit (Amendment) Regulations 2015 (S.I. 2015/1529), regs. 1, **2(3)(c)**

Marginal Citations

M18 1998 c. 14.

Small amounts of state pension credit

13. Where the amount of state pension credit payable is less than 10 pence per week, the credit shall not be payable unless the claimant is in receipt of another benefit payable with the credit.

[^{F165}Part-weeks

13A.—(1) The guarantee credit shall be payable for a period of less than a week (“a part-week”) at the rate specified in paragraph (3) if—

(a) the claimant was entitled to [^{F166}universal credit,] income support[^{F167}, an income-related employment and support allowance] or an income-based jobseeker’s allowance immediately before the first day on which the conditions for entitlement to the credit are satisfied; and

(b) the claimant’s entitlement to the credit is likely to continue throughout the first full benefit week which follows the part-week.

^{F168}(2)

(3) The amount of the guarantee credit payable in respect of the part-week shall be determined—

(a) by dividing by 7 the weekly amount of the guarantee credit which^{F169}... would be payable in respect of a full week; and then

(b) multiplying the resulting figure by the number of days in the part-week,

^{F170} ...

Textual Amendments

F165 Reg. 13A - Reg. 13B inserted (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) Regulations 2002 (S.I. 2002/3019), regs. 1(2)(b), **23(f)**

F166 Words in reg. 13A(1)(a) inserted (29.4.2013) by The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013 (S.I. 2013/630), regs. 1(2), **33(4)**

F167 Words in reg. 13A(1)(a) inserted (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(4)**

F168 Reg. 13A(2) omitted (6.4.2010) by virtue of The Social Security (Miscellaneous Amendments) (No. 6) Regulations 2009 (S.I. 2009/3229), regs. 1, **3(3)(a)**

F169 Words in reg. 13A(3)(a) omitted (6.4.2010) by virtue of The Social Security (Miscellaneous Amendments) (No. 6) Regulations 2009 (S.I. 2009/3229), regs. 1, **3(3)(b)**

F170 Words in reg. 13A(3) omitted (6.4.2010) by virtue of The Social Security (Miscellaneous Amendments) (No. 6) Regulations 2009 (S.I. 2009/3229), regs. 1, **3(3)(c)**

Date on which benefits are treated as paid

13B.—(1) The following benefits shall be treated as paid on the day of the week in respect of which the benefit is payable—

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Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- (a) severe disablement allowance;
- (b) short-term and long-term incapacity benefit;
- (c) maternity allowance;
- (d) contribution-based jobseeker's allowance^{F171}
- [contributory employment and support allowance.]
- ^{F172}(e)
- [^{F173}(2) All benefits except those mentioned in paragraph (1) shall be treated as paid—
- (a) where the benefit is paid in advance, on the first day of the benefit week in which the benefit is payable;
- (b) where the benefit is paid in arrears, on the last day of the benefit week in which the benefit is payable.]]

Textual Amendments

- F165** Reg. 13A - Reg. 13B inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(f)**
- F171** Words in reg. 13B(1)(d) omitted (29.4.2013) by virtue of [The Universal Credit \(Consequential, Supplementary, Incidental and Miscellaneous Provisions\) Regulations 2013 \(S.I. 2013/630\)](#), regs. 1(2), **33(5)**
- F172** Reg. 13B(1)(e) added (27.10.2008) by [The Employment and Support Allowance \(Consequential Provisions\) \(No. 2\) Regulations 2008 \(S.I. 2008/1554\)](#), regs. 1(2)(b), **4(5)**
- F173** Reg. 13B(2) substituted (6.4.2010) by [The Social Security \(Miscellaneous Amendments\) \(No. 6\) Regulations 2009 \(S.I. 2009/3229\)](#), regs. 1, **3(4)**

PART III

Income

Calculation of income and capital

- 14.** The income and capital of—
- (a) the claimant; and
 - (b) any partner of the claimant,

shall be calculated in accordance with the rules set out in this Part; and any reference in this Part to the claimant shall apply equally to any partner of the claimant.

Income for the purposes of the Act

15.—(1) For the purposes of section 15(1)(e) (income), all social security benefits are prescribed except—

- [^{F174}(za) universal credit;]
- (a) disability living allowance;
- [^{F175}(aa) personal independence payment;]
- (ab) [^{F176}armed forces independence payment;]
- (b) attendance allowance payable under section 64 of the 1992 Act;

- (c) an increase of disablement pension under section 104 or 105 of the 1992 Act;
- (d) a payment under regulations made in exercise of the power conferred by paragraph 7(2)(b) of Part II of Schedule 8 to the 1992 Act^{M19};
- (e) an increase of an allowance payable in respect of constant attendance under paragraph 4 of Part I of Schedule 8 to the 1992 Act;
- (f) any child special allowance payable under section 56 of the 1992 Act;
- (g) any guardian’s allowance payable under section 77 of the 1992 Act;
- (h) any increase for a dependant, other than the claimant’s partner, payable in accordance with Part IV of the 1992 Act;
- (i) any social fund payment made under Part VIII of the 1992 Act;
- (j) child benefit payable in accordance with Part IX of the 1992 Act;
- (k) Christmas bonus payable under Part X of the 1992 Act;
- [^{F177}(l) housing benefit;
- ^{F178}(m)
- (n) [^{F179}bereavement support payment under section 30 of the Pensions Act 2014;]
- (o) statutory sick pay;
- (p) statutory maternity pay;
- (q) [^{F180}ordinary statutory paternity pay payable under Part 12ZA of the 1992 Act;]
- ^{F181}(qa)
- [^{F182}(qb) statutory shared parental pay payable under Part 12ZC of the 1992 Act;]
- [^{F183}(qc) statutory parental bereavement pay payable under Part 12ZD of the 1992 Act;]
- (r) statutory adoption pay payable under Part 12ZB of the 1992 Act;
- [^{F184}(ra) carer’s allowance supplement payable under section 81 of the Social Security (Scotland) Act 2018;]
- [^{F185}(rb) early years assistance given in accordance with section 32 of the Social Security (Scotland) Act 2018;]
- [^{F186}(rc) funeral expense assistance given in accordance with section 34 of the Social Security (Scotland) Act 2018.]
- [^{F187}(rd) any Scottish child payment assistance given in accordance with section 79 of the Social Security (Scotland) Act 2018.]
- [^{F188}(re) any assistance given in accordance with the Carer’s Assistance (Young Carer Grants) (Scotland) Regulations 2019;]
- [^{F189}(rf) short-term assistance given in accordance with regulations made under section 36 of the Social Security (Scotland) Act 2018;]
- [^{F190}(rg) winter heating assistance given in accordance with regulations made under section 30 of the Social Security (Scotland) Act 2018;]
- [^{F191}(rh) disability assistance given in accordance with regulations made under section 31 of the Social Security (Scotland) Act 2018;]
- (s) any benefit similar to those mentioned in the preceding provisions of this paragraph payable under legislation having effect in Northern Ireland.]
- [^{F192}(2) For the purposes of section 15(1)(f) (foreign social security benefits) of the Act, income includes—

Status: Point in time view as at 08/06/2024.

*Changes to legislation: There are currently no known outstanding effects for the
The State Pension Credit Regulations 2002. (See end of Document for details)*

- (a) all foreign social security benefits which are similar to the social security benefits prescribed under paragraph (1), and
 - (b) any foreign state retirement pension.]
- (3) Where the payment of any social security benefit prescribed under paragraph (1)^[F193], or retirement pension income to which section 16(1)(za) to (e) applies,] is subject to any deduction (other than an adjustment specified in paragraph (4)) the amount to be taken into account under paragraph (1)^[F194], or section 16(1)(za) to (e),] shall be the amount before the deduction is made.
- (4) The adjustments specified in this paragraph are those made in accordance with—
- (a) the Social Security (Overlapping Benefits) Regulations 1979^{M20};
 - ^[F195](b) regulation 2 of the Social Security (Hospital In-Patients) Regulations 2005;]
 - (c) section 30DD or section 30E of the 1992 Act^{M21} (reductions in incapacity benefit in respect of pensions and councillor’s allowances).
 - ^[F196](d) section 3 of the Welfare Reform Act (deductions from contributory allowance).]
 - ^[F197](e) section 14 of the Pensions Act 2014 (pension sharing: reduction in the sharer’s section 4 pension);
 - (f) section 45B or 55B of the Social Security Contributions and Benefits Act 1992 (reduction of additional pension in Category A retirement pension and shared additional pension: pension sharing).]
 - ^[F198](g) regulation 16(2) of the Carer’s Assistance (Carer Support Payment) (Scotland) Regulations 2023.]
- (5) For the purposes of section 15(1)(j) (income to include income of prescribed descriptions), income of the following descriptions is prescribed—
- ^[F199](a) a payment made—
 - (i) under article 30 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006, in any case where article 30(1)(b) applies; or
 - (ii) under article 12(8) of that Order, in any case where sub-paragraph (b) of that article applies;]
 - ^[F200](aa) a guaranteed income payment;
 - (ab) a payment made under article 21(1)(c) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2005^[F201], in any case where article 23(2)(c) applies;]
 - ^[F202](ac) any retired pay, pension or allowance granted in respect of disablement or any pension or allowance granted to a widow, widower or surviving civil partner in respect of a death due to service or war injury under an instrument specified in section 639(2) of the Income Tax (Earnings and Pensions) Act 2003, where such payment does not fall within paragraph (a) of the definition of “war disablement pension” in section 17(1) of the State Pension Credit Act 2002 or, in respect of any retired pay or pension granted in respect of disablement, where such payment does not fall within paragraph (b) of that definition;]
 - ^[F203](b) a pension paid by a government to victims of National Socialist persecution;]
 - (c) payments under a scheme made under the Pneumoconiosis etc. (Worker’s Compensation) Act 1979^{M22};
 - (d) payments made towards the maintenance of the claimant by his spouse^[F204], civil partner, former spouse or former civil partner] or towards the maintenance of the claimant’s partner by his spouse^[F204], civil partner, former spouse or former civil partner], including payments made—

- (i) under a court order;
- (ii) under an agreement for maintenance; or
- (iii) voluntarily;
- (e) payments due from any person in respect of board and lodging accommodation provided by the claimant^{F205} ...;
- [^{F206}(f) royalties or other sums paid as a consideration for the use of, or the right to use, any copyright, design, patent or trade mark;]
- [^{F207}(g) any payment in respect of any—
 - (i) book registered under the Public Lending Right Scheme 1982; or
 - (ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982;]
- [^{F208}(h) any income in lieu of that specified in—
 - (i) paragraphs (a) to (i) of section 15(1) of the Act, or
 - (ii) in this regulation;
 (i) any payment of rent made to a claimant who—
 - (i) owns the freehold or leasehold interest in any property or is a tenant of any property;
 - (ii) occupies part of that property; and
 - (iii) has an agreement with another person allowing that person to occupy that property on payment of rent.]
- [^{F209}(j) any payment made at regular intervals under an equity release scheme.]
- [^{F210}(k) PPF periodic payments.]
- [^{F211}(6) For the purposes of section 15(2) (deemed income from capital) and subject to regulation 17(8) (capital to be disregarded), a claimant’s capital shall be deemed to yield a weekly income of—
 - (a) £1 for each £500 in excess of £10,000; and
 - (b) £1 for any excess which is not a complete £500.]
- ^{F212}(7)
- ^{F212}(8)

Textual Amendments

- F174** Reg. 15(1)(za) inserted (25.11.2020) by [The Universal Credit \(Persons who have attained state pension credit qualifying age\) \(Amendment\) Regulations 2020 \(S.I. 2020/655\)](#), regs. 1(2), **2(3)**
- F175** Reg. 15(1)(aa) inserted (8.4.2013) by [The Personal Independence Payment \(Supplementary Provisions and Consequential Amendments\) Regulations 2013 \(S.I. 2013/388\)](#), reg. 2, **Sch. para. 27(3)**
- F176** Reg. 15(1)(ab) inserted (8.4.2013) by [The Armed Forces and Reserve Forces Compensation Scheme \(Consequential Provisions: Subordinate Legislation\) Order 2013 \(S.I. 2013/591\)](#), art. 2(2), **Sch. para. 23(3)**
- F177** Reg. 15(1)(l)-(s) substituted for reg. 15(1)(l) (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(g)**
- F178** Reg. 15(1)(m) revoked (1.4.2013) by [The Council Tax Benefit Abolition \(Consequential Provision\) Regulations 2013 \(S.I. 2013/458\)](#), reg. 1, **Sch. 1**

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- F179** Reg. 15(1)(n) substituted (coming into force in accordance with art. 1-3 of the amending S.I.) by The Pensions Act 2014 (Consequential, Supplementary and Incidental Amendments) Order 2017 (S.I. 2017/422), arts. 1(2), **21(2)**
- F180** Reg. 15(1)(q)(qa) substituted for reg. 15(1)(q) (1.4.2012) by The Social Security (Miscellaneous Amendments) Regulations 2012 (S.I. 2012/757), regs. 1(4), **5(3)**
- F181** Reg. 15(1)(qa) omitted (5.4.2015) by virtue of The Shared Parental Leave and Statutory Shared Parental Pay (Consequential Amendments to Subordinate Legislation) Order 2014 (S.I. 2014/3255), arts. 1(3), **10(3)(a)** (with art. 35(1))
- F182** Reg. 15(1)(qb) inserted (31.12.2014) by The Shared Parental Leave and Statutory Shared Parental Pay (Consequential Amendments to Subordinate Legislation) Order 2014 (S.I. 2014/3255), arts. 1(2), **10(3)(b)**
- F183** Reg. 15(1)(qc) inserted (6.4.2020) by The Parental Bereavement Leave and Pay (Consequential Amendments to Subordinate Legislation) Regulations 2020 (S.I. 2020/354), regs. 1, **10(3)**
- F184** Reg. 15(1)(ra) inserted (3.9.2018) by The Social Security (Scotland) Act 2018 (Consequential Modifications) Order 2018 (S.I. 2018/872), arts. 1(2), **4(2)**
- F185** Reg. 15(1)(rb) inserted (coming into force in accordance with art. 1(2) of the amending S.I.) by The Social Security (Scotland) Act 2018 (Best Start Grants) (Consequential Modifications and Saving) Order 2018 (S.I. 2018/1138), **art. 7(2)**
- F186** Reg. 15(1)(rc) inserted (16.9.2019 immediately after S.S.I. 2019/292 comes into force) by The Social Security (Scotland) Act 2018 (Funeral Expense Assistance and Early Years Assistance) (Consequential Modifications and Savings) Order 2019 (S.I. 2019/1060), arts. 1(2)(b), **11(2)**
- F187** Reg. 15(1)(rd) inserted (coming into force in accordance with art. 1(2) of the amending S.I.) by The Social Security (Scotland) Act 2018 (Information-Sharing and Scottish Child Payment) (Consequential Provision and Modifications) Order 2020 (S.I. 2020/482), **art. 5(2)**
- F188** Reg. 15(1)(re) inserted (9.11.2020) by The Social Security (Scotland) Act 2018 (Young Carer Grants, Short-Term Assistance and Winter Heating Assistance) (Consequential Provision and Modifications) Order 2020 (S.I. 2020/989), arts. 1(2), **4(2)**
- F189** Reg. 15(1)(rf) inserted (9.11.2020) by The Social Security (Scotland) Act 2018 (Young Carer Grants, Short-Term Assistance and Winter Heating Assistance) (Consequential Provision and Modifications) Order 2020 (S.I. 2020/989), arts. 1(2), **11(2)**
- F190** Reg. 15(1)(rg) inserted (9.11.2020) by The Social Security (Scotland) Act 2018 (Young Carer Grants, Short-Term Assistance and Winter Heating Assistance) (Consequential Provision and Modifications) Order 2020 (S.I. 2020/989), arts. 1(2), **17(2)**
- F191** Reg. 15(1)(rh) inserted (26.7.2021) by The Social Security (Scotland) Act 2018 (Disability Assistance, Young Carer Grants, Short-term Assistance and Winter Heating Assistance) (Consequential Provision and Modifications) Order 2021 (S.I. 2021/886), arts. 1(2), **13(2)**
- F192** Reg. 15(2) substituted (13.4.2010) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2010 (S.I. 2010/641), regs. 1(4)(c), **6(5)**
- F193** Words in reg. 15(3) inserted (16.11.2017) by The Social Security (Miscellaneous Amendments No. 4) Regulations 2017 (S.I. 2017/1015), regs. 1(2), **10(2)(a)(i)**
- F194** Words in reg. 15(3) inserted (16.11.2017) by The Social Security (Miscellaneous Amendments No. 4) Regulations 2017 (S.I. 2017/1015), regs. 1(2), **10(2)(a)(ii)**
- F195** Reg. 15(4)(b) substituted (10.4.2006) by The Social Security (Hospital In-Patients) Regulations 2005 (S.I. 2005/3360), regs. 1(a), **8(3)**
- F196** Reg. 15(4)(d) added (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(6)**
- F197** Reg. 15(4)(e)(f) added (16.11.2017) by The Social Security (Miscellaneous Amendments No. 4) Regulations 2017 (S.I. 2017/1015), regs. 1(2), **10(2)(b)**
- F198** Reg. 15(4)(g) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(4)**
- F199** Reg. 15(5)(a) substituted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by The Social Security (Miscellaneous Amendments) (No. 7) Regulations 2008 (S.I. 2008/3157), regs. 1(2), **4(3)(a)**

- F200** Reg. 15(5)(aa)(ab) inserted (4.4.2005) by The Social Security (Miscellaneous Amendments) Regulations 2005 (S.I. 2005/574), regs. 1(1), **2(2)**
- F201** Words in reg. 15(5)(ab) substituted (5.1.2009) by The Social Security (Miscellaneous Amendments) (No. 7) Regulations 2008 (S.I. 2008/3157), regs. 1(1), **4(3)(b)**
- F202** Reg. 15(5)(ac) inserted (5.1.2009) by The Social Security (Miscellaneous Amendments) (No. 7) Regulations 2008 (S.I. 2008/3157), regs. 1(1), **4(3)(c)**
- F203** Reg. 15(5)(b) substituted (20.3.2017) by The Social Security (Income-Related Benefits) Amendment Regulations 2017 (S.I. 2017/174), regs. 1, **4(2)**
- F204** Words in reg. 15(5)(d) substituted (5.12.2005) by The Civil Partnership (Pensions, Social Security and Child Support) (Consequential, etc. Provisions) Order 2005 (S.I. 2005/2877), art. 1, **Sch. 3 para. 35(3)** (with art. 3)
- F205** Words in reg. 15(5)(e) omitted (3.10.2005) by virtue of The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2005 (S.I. 2005/2465), regs. 1(2), **6(3)**
- F206** Reg. 15(5)(f) substituted (for specified purposes and with effect in accordance with reg. 1(4) of the amending S.I.) by The Social Security (Miscellaneous Amendments) Regulations 2009 (S.I. 2009/583), **reg. 5(2)(a)**
- F207** Reg. 15(5)(g) substituted (for specified purposes and with effect in accordance with reg. 1(4) of the amending S.I.) by The Social Security (Miscellaneous Amendments) Regulations 2009 (S.I. 2009/583), **reg. 5(2)(b)**
- F208** Reg. 15(5)(h)(i) added (6.10.2003) by The State Pension Credit (Transitional and Miscellaneous Provisions) Amendment Regulations 2003 (S.I. 2003/2274), regs. 1, **2(7)(b)**
- F209** Reg. 15(5)(j) added (4.10.2004) by The Social Security (Housing Benefit, Council Tax Benefit, State Pension Credit and Miscellaneous Amendments) Regulations 2004 (S.I. 2004/2327), regs. 1(1)(a), **7(3)**
- F210** Reg. 15(5)(k) added (6.4.2006) by The Social Security (Miscellaneous Amendments) Regulations 2006 (S.I. 2006/588), regs. 1(2), **4(2)**
- F211** Reg. 15(6) substituted (2.11.2009) by The Social Security (Deemed Income from Capital) Regulations 2009 (S.I. 2009/1676), regs. 1, **3(2)**
- F212** Reg. 15(7)(8) omitted (2.11.2009) by virtue of The Social Security (Deemed Income from Capital) Regulations 2009 (S.I. 2009/1676), regs. 1, **3(3)**

Marginal Citations

- M19** See in particular paragraph 7(2)(b) of Schedule 8.
- M20** S.I. 1979/597.
- M21** Sections 30DD and 30E were inserted by section 3(1) of the Social Security (Incapacity for Work) Act 1994 (c. 18).
- M22** 1979 c. 41; amended by section 24 of the Social Security Act 1985 (c. 53).

Retirement pension income

16. There shall be added to the descriptions of income listed in section 16(1) (retirement pension income) the following [^{F213}paragraphs]—

“(k) any sum payable by way of pension out of money provided under the Civil List Act 1837^{M23}, the Civil List Act 1937^{M24}, the Civil List Act 1952^{M25}, the Civil List Act 1972^{M26} or the [^{F214}Civil List Act 1975]^{M27} [^{F215};

(1) any payment, other than a payment ordered by a court or made in settlement of a claim, made by or on behalf of a former employer of a person on account of the early retirement of that person on grounds of ill-health or disability.]

[^{F216}(m) any payment made at regular intervals under an equity release scheme.]

[^{F217}(n) any payment made under the Financial Assistance Scheme Regulations 2005.”]

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

Textual Amendments

- F213** Word in reg. 16 substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 4(a)**
- F214** Words in reg. 16 substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 4(b)**
- F215** Words in reg. 16 added (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 4(c)**
- F216** Words in reg. 16 added (4.10.2004) by [The Social Security \(Housing Benefit, Council Tax Benefit, State Pension Credit and Miscellaneous Amendments\) Regulations 2004 \(S.I. 2004/2327\)](#), regs. 1(1)(a), **7(4)**
- F217** Words in reg. 16 added (18.12.2005) by [The State Pension Credit \(Amendment\) Regulations 2005 \(S.I. 2005/3205\)](#), regs. 1, **2(3)**

Marginal Citations

- M23** 1837 c. 2.
- M24** 1937 c. 32.
- M25** 1952 c. 37.
- M26** 1972 c. 7.
- M27** 1975 c. 82.

Calculation of weekly income

17.—(1) Except where paragraph (2) and (4) apply, for the purposes of calculating the weekly income of the claimant, where the period in respect of which a payment is made—

- (a) does not exceed a week, the whole of that payment shall be included in the claimant's weekly income;
- (b) exceeds a week, the amount to be included in the claimant's weekly income shall be determined—
 - (i) in a case where that period is a month, by multiplying the amount of the payment by 12 and dividing the product by 52;
 - (ii) in a case where that period is three months, by multiplying the amount of the payment by 4 and dividing the product by 52;
 - (iii) in a case where that period is a year, by dividing the amount of the payment by 52;
 - (iv) in any other case, by multiplying the amount of the payment by 7 and dividing the product by the number of days in the period in respect of which it is made.

(2) Where—

- (a) the claimant's regular pattern of work is such that he does not work the same hours every week; or
- (b) the amount of the claimant's income fluctuates and has changed more than once,

the weekly amount of that claimant's income shall be determined—

- (i) if, in a case to which sub-paragraph (a) applies, there is a recognised cycle of work, by reference to his average weekly income over the period of the complete cycle (including, where the cycle involves periods in which the claimant does no work, those periods but disregarding any other absences); or
- (ii) in any other case, on the basis of—
 - (aa) the last two payments if those payments are one month or more apart;

- (bb) the last four payments if the last two payments are less than one month apart; or
- (cc) such other payments as may, in the particular circumstances of the case, enable the claimant's average weekly income to be determined more accurately.

(3) For the purposes of paragraph (2)(b) the last payments are the last payments before the date the claim was made or treated as made or, if there is a subsequent supersession under section 10 of the Social Security Act 1998^{M28}, the last payments before the date of the supersession.

(4) If a claimant is entitled to receive a payment to which paragraph (5) applies, the amount of that payment shall be treated as if made in respect of a period of a year.

(5) This paragraph applies to—

- [^{F218}(a) royalties or other sums received as a consideration for the use of, or the right to use, any copyright, design, patent or trade mark;]
- [^{F219}(b) any payment in respect of any—
 - (i) book registered under the Public Lending Right Scheme 1982; or
 - (ii) work made under any international public lending right scheme that is analogous to the Public Lending Right Scheme 1982;]
- (c) any payment which is made on an occasional basis.

(6) Where payments are made in a currency other than Sterling, the value of the payment shall be determined by taking the Sterling equivalent on the date the payment is made.

(7) Income specified in Schedule IV is to be disregarded in the calculation of a claimant's income.

(8) Schedule V shall have effect so that—

- (a) the capital specified in Part I shall be disregarded for the purpose of determining a claimant's income; and
- (b) the capital specified in Part II shall be disregarded for the purpose of determining a claimant's income under regulation 15(6).

[^{F220}(9) The sums specified in Schedule VI shall be disregarded in calculating—

- (a) the claimant's earnings; and
- (b) [^{F221}any amount to which paragraph (5) applies where the claimant is the first owner of the copyright, design, patent or trademark, or an original contributor to the book or work referred to in paragraph (5)(b).]

(9A) For the purposes of paragraph (9)(b), and for that purpose only, the amounts specified in paragraph (5) shall be treated as though they were earnings.]

(10) [^{F222}Subject to regulation [^{F223}17B(6)] (deduction of tax and contributions for self-employed earners),] in the case of any income taken into account for the purpose of calculating a person's income, there shall be disregarded—

- (a) any amount payable by way of tax;
- (b) any amount deducted by way of National Insurance Contributions under the 1992 Act or under the Social Security Contributions and Benefits (Northern Ireland) Act 1992^{M29};

^{F224}(c)

[^{F225}(11) In the case of the earnings of self-employed earners, the amounts specified in paragraph (10) shall be taken into account in accordance with paragraph (4) or, as the case may be, paragraph (10) of regulation 13 of the Computation of Earnings Regulations, as having effect in the case of state pension credit.]

Status: Point in time view as at 08/06/2024.

*Changes to legislation: There are currently no known outstanding effects for the
The State Pension Credit Regulations 2002. (See end of Document for details)*

Textual Amendments

- F218** Reg. 17(5)(a) substituted (for specified purposes and with effect in accordance with reg. 1(4) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) Regulations 2009 \(S.I. 2009/583\)](#), **reg. 5(3)(a)**
- F219** Reg. 17(5)(b) substituted (for specified purposes and with effect in accordance with reg. 1(4) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) Regulations 2009 \(S.I. 2009/583\)](#), **reg. 5(3)(b)**
- F220** Reg. 17(9)(9A) substituted for reg. 17(9) (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(h)(ii)**
- F221** Reg. 17(9)(b) substituted (for specified purposes and with effect in accordance with reg. 1(4) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) Regulations 2009 \(S.I. 2009/583\)](#), **reg. 5(3)(c)**
- F222** Words in reg. 17(10) inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(h)(iii)**
- F223** Word in reg. 17(10) substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 5**
- F224** Reg. 17(10)(c) omitted (6.10.2003) by virtue of [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 5**
- F225** Reg. 17(11) added (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(h)(iv)**

Marginal Citations

- M28** 1998 c. 14.
M29 1992 c. 7.

^{F226} Treatment of final payments of income

- 17ZA.**—(1) Save where regulation 13B applies, this regulation applies where—
- (a) a claimant has been receiving a regular payment of income;
 - (b) that payment is coming to an end or has ended; and
 - (c) the claimant receives a payment of income whether as the last of the regular payments or following the last of them (“the final payment”).
- (2) For the purposes of regulation 17(1)—
- (a) where the amount of the final payment is less than or equal to the amount of the preceding, or the last, regular payment, the whole amount shall be treated as being paid in respect of a period of the same length as that in respect of which that regular payment was made;
 - (b) where the amount of the final payment is greater than the amount of that regular payment—
 - (i) to the extent that it comprises (whether exactly or with an excess remaining) one or more multiples of that amount, each such multiple shall be treated as being paid in respect of a period of the same length as that in respect of which that regular payment was made; and
 - (ii) any excess shall be treated as paid in respect of a further period of the same length as that in respect of which that regular payment was made.
- (3) A final payment referred to in paragraph (2)(a) shall, where not in fact paid on the date on which a regular payment would have been paid had it continued in payment, be treated as paid on that date.

(4) Each multiple and any excess referred to in paragraph (2)(b) shall be treated as paid on the dates on which a corresponding number of regular payments would have been made had they continued in payment.

(5) For the purposes of this regulation, a “regular payment” means a payment of income made in respect of a period—

- (a) referred to in regulation 17(1)(a) or (b) on a regular date; or
- (b) which is subject to the provisions of regulation 17(2).]

Textual Amendments

F226 Reg. 17ZA inserted (5.4.2004) by [The State Pension Credit \(Miscellaneous Amendments\) Regulations 2004 \(S.I. 2004/647\)](#), regs. 1, **3(4)**

[^{F227}Earnings of an employed earner

17A.—(1) For the purposes of state pension credit, the provisions of this regulation which relate to the earnings of employed earners, shall have effect in place of those prescribed for such earners in the Computation of Earnings Regulations.

(2) Subject to paragraphs [^{F228}(3), (4) and (4A)], “earnings” in the case of employment as an employed earner, means any remuneration or profit derived from that employment and includes—

- (a) any bonus or commission;
- (b) any payment in lieu of remuneration except any periodic sum paid to a claimant on account of the termination of his employment by reason of redundancy;
- (c) any payment in lieu of notice;
- (d) any holiday pay;
- (e) any payment by way of a retainer;
- (f) any payment made by the claimant’s employer in respect of expenses not wholly, exclusively and necessarily incurred in the performance of the duties of the employment, including any payment made by the claimant’s employer in respect of—
 - (i) travelling expenses incurred by the claimant between his home and place of employment;
 - (ii) expenses incurred by the claimant under arrangements made for the care of a member of his family owing to the claimant’s absence from home;
- (g) the amount of any payment by way of a non-cash voucher which has been taken into account in the computation of a person’s earnings in accordance with Part V of Schedule 3 to the Social Security (Contributions) Regulations 2001;
- (h) statutory sick pay and statutory maternity pay payable by the employer under the 1992 Act;
- [^{F229}(i) ^{F230} ... statutory paternity pay payable under Part 12ZA of the 1992 Act;]
- ^{F231}(ia)
[statutory shared parental pay payable under Part 12ZC of the 1992 Act;]
- ^{F232}(ib)
[statutory parental bereavement pay payable under Part 12ZD of the 1992 Act;]
- ^{F233}(ic)
(j) statutory adoption pay payable under Part 12ZB of the 1992 Act;
- (k) any sums payable under a contract of service—

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- (i) for incapacity for work due to sickness or injury; or
- (ii) by reason of pregnancy or confinement.
- (3) “Earnings” shall not include—
- (a) subject to paragraph (4), any payment in kind;
 - (b) any payment in respect of expenses wholly, exclusively and necessarily incurred in the performance of the duties of the employment;
 - (c) any occupational pension;
 - (d) any lump sum payment made under the Iron and Steel Re-adaptation Benefits Scheme^{F234};
 - (e) any payment of compensation made pursuant to an award by an employment tribunal in respect of unfair dismissal or unlawful discrimination]
 - ^{F235}(f) [any payment in respect of expenses arising out of the ^{F236}claimant participating as a service user].]
- (4) Paragraph (3)(a) shall not apply in respect of any non-cash voucher referred to in paragraph (2)(g).
- [^{F237}(4A) One half of any sum paid by a claimant by way of a contribution towards an occupational pension scheme or a personal pension scheme shall, for the purpose of calculating his earnings in accordance with this regulation, be disregarded.]
- (5) In this regulation “employed earner” means a person who is gainfully employed in Great Britain either under a contract of service, or in an office (including elective office) with emoluments chargeable to income tax under Schedule E.

Textual Amendments

- F227** Reg. 17A - Reg. 17B inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(i)**
- F228** Words in reg. 17A(2) substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), regs. 1(1)(b), **3(1)(a)**
- F229** Reg. 17A(2)(i)(ia) substituted for reg. 17A(2)(i) (1.4.2012) by [The Social Security \(Miscellaneous Amendments\) Regulations 2012 \(S.I. 2012/757\)](#), regs. 1(4), **5(4)**
- F230** Word in reg. 17A(2)(i) omitted (5.4.2015) by virtue of [The Shared Parental Leave and Statutory Shared Parental Pay \(Consequential Amendments to Subordinate Legislation\) Order 2014 \(S.I. 2014/3255\)](#), arts. 1(3), **10(4)(a)** (with art. 35(1))
- F231** Reg. 17A(2)(ia) omitted (5.4.2015) by virtue of [The Shared Parental Leave and Statutory Shared Parental Pay \(Consequential Amendments to Subordinate Legislation\) Order 2014 \(S.I. 2014/3255\)](#), arts. 1(3), **10(4)(b)** (with art. 35(1))
- F232** Reg. 17A(2)(ib) inserted (31.12.2014) by [The Shared Parental Leave and Statutory Shared Parental Pay \(Consequential Amendments to Subordinate Legislation\) Order 2014 \(S.I. 2014/3255\)](#), arts. 1(2), **10(4)(c)**
- F233** Reg. 17A(2)(ic) inserted (6.4.2020) by [The Parental Bereavement Leave and Pay \(Consequential Amendments to Subordinate Legislation\) Regulations 2020 \(S.I. 2020/354\)](#), regs. 1, **10(4)**
- F234** Reg. 17A(3)(e) added (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), regs. 1(1)(b), **3(1)(b)**
- F235** Reg. 17A(3)(f) added (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2009 \(S.I. 2009/2655\)](#), regs. 1(2)(c), **5(3)**
- F236** Words in reg. 17A(3)(f) substituted (28.4.2014) by [The Social Security \(Miscellaneous Amendments\) Regulations 2014 \(S.I. 2014/591\)](#), regs. 1, **7(3)**

F237 Reg. 17A(4A) inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), regs. 1(1)(b), **3(1)(c)**

Earnings of self-employed earners

17B.—(1) For the purposes of state pension credit, the provisions of the Computation of Earnings Regulations in their application to the earnings of self-employed earners, shall have effect in so far as provided by this regulation.

(2) In their application to state pension credit, regulations 11 to 14 of the Computation of Earnings Regulations shall have effect as if—

[^{F238}(za) “board and lodging accommodation” has the same meaning as in [^{F239}regulation 1(2)];]

- (a) “claimant” referred to a person claiming state pension credit and any partner of the claimant;
- (b) “personal pension scheme” referred to a personal pension scheme—
 - (i) as defined in section 1 of the Pension Schemes Act 1993; or
 - (ii) as defined in section 1 of the Pension Schemes (Northern Ireland) Act 1993.

(3) In regulation 11 (calculation of earnings of self-employed earners), paragraph (1) shall have effect, but as if the words “Except where paragraph (2) applies” were omitted.

(4) In regulation 12 (earnings of self-employed earners)—

- (a) paragraph (1) shall have effect;
- (b) [^{F240}the following paragraph shall be added after paragraph (1)]—

(“ Earnings does not include—

- (a) where a claimant occupies a dwelling as his home and he provides in that dwelling board and lodging accommodation for which payment is made, those payments;

[^{F241}(b) any payment made by a local authority to a claimant with whom a person is accommodated by virtue of arrangements made under—

- (i) [^{F242}section 22C(2) of the Children Act 1989 (ways in which looked after children are to be accommodated and maintained),]

[^{F243}(ia) section 81(2) of the Social Services and Well-being (Wales) Act 2014 (ways in which looked after children are to be accommodated and maintained),]

- (ii) [^{F244}section 26 or 26A of the Children (Scotland) Act 1995 (manner of provision of accommodation to child looked after by local authority and duty to provide continuing care), or]

(iii) regulations 33 or 51 of the Looked After Children (Scotland) Regulations 2009 (fostering and kinship care allowances and fostering allowances);]

(c) any payment made by a voluntary organisation in accordance with section 59(1)(a) of the Children Act 1989 (provision of accommodation by voluntary organisations);

(d) any payment made to the claimant or his partner for a person (“the person concerned”) who is not normally a member of the claimant’s household but is temporarily in his care, by—

- (i) a health authority;
- (ii) a local authority;
- (iii) a voluntary organisation;

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- (iv) the person concerned pursuant to section 26(3A) of the National Assistance Act 1948;^{F245} ...
 - [^{F247} an integrated care board] established under section 14D of the National Health Service Act 2006;
 - (ivb) [^{F248} NHS England];^{F249} ...]
 - ^{F250}(v)
 - [a Local Health Board established under section 16BA of the National Health Service Act 1977 or established by an order made under section 11 of the Health Service (Wales) Act;]^{F252} ...
 - [the person concerned where the payment is for the provision of accommodation in respect of the meeting of that person’s needs under section 18 or 19 of the Care Act 2014 (duty and power to meet needs for care and support);]^{F253}[^{F254} or]
 - [the person concerned where the payment is for the provision of accommodation to meet that person’s needs for care and support under section 35 or 36 of the Social Services and Well-being (Wales) Act 2014 (duty and power to meet care and support needs of an adult);]
- ^{F255}(da) [any payment or part of a payment made by a local authority in accordance with section 26A of the Children (Scotland) Act 1995 (duty to provide continuing care) to a person (“A”) which A passes on to the claimant where A—
 - (i) was formerly in the claimant’s care;
 - (ii) is aged 16 or over; and
 - (iii) continues to live with the claimant;]
- ^{F256}(db) [any payment made to a claimant under section 73(1)(b) of the Children and Young People (Scotland) Act 2014 (kinship care assistance).]
 - (e) any sports award.”.
- (5) In regulation 13 (calculation of net profit of self-employed earners)—
 - (a) for paragraphs (1) to (3), the following provision shall have effect—
 - (“) For the purposes of regulation 11 (calculation of earnings of self-employed earners), the earnings of a claimant to be taken into account shall be—
 - (a) in the case of a self-employed earner who is engaged in employment on his own account, the net profit derived from that employment;
 - (b) in the case of a self-employed earner whose employment is carried on in partnership, his share of the net profit derived from that employment less—
 - (i) an amount in respect of income tax and of social security contributions payable under the Contributions and Benefits Act calculated in accordance with regulation 14 (deduction of tax and contributions for self-employed earners); and
 - (ii) one half of any premium paid in the period that is relevant under regulation 11 in respect of a retirement annuity contract or a personal pension scheme.”
 - (b) paragraphs (4) to (12) shall have effect.
 - (6) Regulation 14 (deduction of tax and contributions for self-employed earners) shall have effect.]

Textual Amendments

- F227** Reg. 17A - Reg. 17B inserted (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) Regulations 2002 (S.I. 2002/3019), regs. 1(2)(b), **23(i)**
- F238** Reg. 17B(2)(za) inserted (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), regs. 1(1)(b), **3(2)(a)**
- F239** Words in reg. 17B(2)(za) substituted (3.10.2005) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2005 (S.I. 2005/2465), regs. 1(2), **6(4)**
- F240** Words in reg. 17B(4)(b) substituted (1.11.2010) by The Social Security (Miscellaneous Amendments) (No. 5) Regulations 2010 (S.I. 2010/2429), regs. 1(2), **6(a)**
- F241** Words in reg. 17B(4)(b) substituted (1.11.2010) by The Social Security (Miscellaneous Amendments) (No. 5) Regulations 2010 (S.I. 2010/2429), regs. 1(2), **6(b)**
- F242** Words in reg. 17B(4)(b) substituted (3.11.2017) by The Social Services and Well-being (Wales) Act 2014 and the Regulation and Inspection of Social Care (Wales) Act 2016 (Consequential Amendments) Order 2017 (S.I. 2017/901), arts. 1, **24**
- F243** Words in reg. 17B(4)(b) inserted (3.11.2017) by The Social Services and Well-being (Wales) Act 2014 and the Regulation and Inspection of Social Care (Wales) Act 2016 (Consequential Amendments) Order 2017 (S.I. 2017/901), arts. 1, **9(2)(a)**
- F244** Words in reg. 17B(4)(b) inserted (5.8.2016) by The Children and Young People (Scotland) Act 2014 (Consequential Modifications) Order 2016 (S.I. 2016/732), arts. 1(1), **4(2)(a)**
- F245** Word in reg. 17B(4)(b) omitted (5.1.2009) by virtue of The Social Security (Miscellaneous Amendments) (No. 7) Regulations 2008 (S.I. 2008/3157), regs. 1(1), **4(4)(a)**
- F246** Words in reg. 17B(4)(b) inserted (1.4.2013) by The National Treatment Agency (Abolition) and the Health and Social Care Act 2012 (Consequential, Transitional and Saving Provisions) Order 2013 (S.I. 2013/235), art. 1(2), **Sch. 2 para. 54(3)(a)**
- F247** Words in Reg. 17B(4)(b) substituted (1.7.2022) by The Health and Care Act 2022 (Consequential and Related Amendments and Transitional Provisions) Regulations 2022 (S.I. 2022/634), reg. 1(2), Sch. para. 1(1)(3) (with Sch. para. 1(2))
- F248** Words in Instrument substituted (6.11.2023) by The Health and Care Act 2022 (Further Consequential Amendments) (No. 2) Regulations 2023 (S.I. 2023/1071), reg. 1(1), **Sch. para. 1**
- F249** Word in reg. 17B(4)(b) omitted (1.4.2015) by virtue of The Care Act 2014 (Consequential Amendments) (Secondary Legislation) Order 2015 (S.I. 2015/643), art. 1(2), **Sch. para. 19(2)(a)** (with art. 4)
- F250** Words in reg. 17B(4)(b) omitted (1.4.2013) by virtue of The National Treatment Agency (Abolition) and the Health and Social Care Act 2012 (Consequential, Transitional and Saving Provisions) Order 2013 (S.I. 2013/235), art. 1(2), **Sch. 2 para. 54(3)(b)**
- F251** Words in reg. 17B(4)(b) inserted (5.1.2009) by The Social Security (Miscellaneous Amendments) (No. 7) Regulations 2008 (S.I. 2008/3157), regs. 1(1), **4(4)(c)**
- F252** Word in reg. 17B(4)(b) omitted (3.11.2017) by virtue of The Social Services and Well-being (Wales) Act 2014 and the Regulation and Inspection of Social Care (Wales) Act 2016 (Consequential Amendments) Order 2017 (S.I. 2017/901), arts. 1, **9(2)(b)**
- F253** Words in reg. 17B(4)(b) inserted (1.4.2015) by The Care Act 2014 (Consequential Amendments) (Secondary Legislation) Order 2015 (S.I. 2015/643), art. 1(2), **Sch. para. 19(2)(b)** (with art. 4)
- F254** Words in reg. 17B(4)(b) inserted (3.11.2017) by The Social Services and Well-being (Wales) Act 2014 and the Regulation and Inspection of Social Care (Wales) Act 2016 (Consequential Amendments) Order 2017 (S.I. 2017/901), arts. 1, **9(2)(c)**
- F255** Words in reg. 17B(4)(b) inserted (5.8.2016) by The Children and Young People (Scotland) Act 2014 (Consequential Modifications) Order 2016 (S.I. 2016/732), arts. 1(1), **4(2)(b)**
- F256** Words in reg. 17B(4)(b) inserted (7.11.2017) by The Social Security and Child Support (Care Payments and Tenant Incentive Scheme) (Amendment) Regulations 2017 (S.I. 2017/995), regs. 1, **4(2)**

Notional income

18.—^[F257](1) A claimant who has attained the qualifying age shall be treated as possessing the amount of any retirement pension income—

- (a) to which section 16(1)^[F258](za) to (e) applies,
- (b) for which no claim has been made, and
- (c) to which the claimant might expect to be entitled if a claim for it were made,

but only from the date on which that income could be expected to be acquired if a claim for it were made.]

^[F259](1A) Paragraph (1) is subject to paragraphs (1B) ^[F260](1CA) ^[F261], (1CB) and (5A).]

^[F262](1B) Where a claimant—

- (a) has deferred entitlement to retirement pension income to which section 16(1)(a) to (c) applies for at least 12 months, and
- (b) would have been entitled to make an election under Schedule 5 or 5A to the 1992 Act or under Schedule 1 to the Graduated Retirement Benefit Regulations,

he shall be treated for the purposes of paragraph (1) as possessing the amount of retirement pension income to which he might expect to be entitled if he were to elect to receive a lump sum.]

^[F263](1C) Paragraphs (1CA) and (1CB) apply for the purposes of paragraph (1) (or, where applicable, paragraph (1) read with paragraph (1B)).

(1CA) Where a benefit or allowance in payment in respect of the claimant would be adjusted under the Social Security (Overlapping Benefits) Regulations 1979 ^[F264]or regulation 16(2) of the Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023] if the retirement pension income had been claimed, he shall be treated as possessing that income minus the benefit or allowance in payment.

(1CB) Where a benefit or allowance in payment in respect of the claimant would require an adjustment to be made under the Social Security (Overlapping Benefits) Regulations 1979 to the amount of retirement pension income payable had it been claimed, he shall be treated as possessing that retirement pension income minus the adjustment which would be made to it.]

^[F265](1D) ^[F266]Subject to paragraph (5A),] a claimant who has attained the qualifying age shall be treated as possessing income from an occupational pension scheme which he elected to defer, but only from the date on which it could be expected to be acquired if a claim for it were made.]

(2) ^[F267]Subject to paragraph (5A),] where a person, ^[F268]who has attained the qualifying age], is a person entitled to money purchase benefits under an occupational pension scheme or a personal pension scheme, or is a party to, or a person deriving entitlement to a pension under, a retirement annuity contract, and—

- (a) he fails to purchase an annuity with the funds available in that scheme where—
 - (i) he defers, in whole or in part, the payment of any income which would have been payable to him by his pension fund holder;
 - (ii) he fails to take any necessary action to secure that the whole of any income which would be payable to him by his pension fund holder upon his applying for it, is so paid; or
 - (iii) income withdrawal is not available to him under that scheme; or
- (b) in the case of a retirement annuity contract, he fails to purchase an annuity with the funds available under that contract,

the amount of any income foregone shall be treated as possessed by him, but only from the date on which it could be expected to be acquired were an application for it to be made.

(3) The amount of any income foregone in a case to which either head (i) or (ii) of paragraph (2) (a) applies shall be the [^{F269}rate of the annuity which may have been purchased with the fund and is to be determined by the Secretary of State, taking account of information provided by the pension fund holder in accordance with regulation 7(5) of the Social Security (Claims and Payments) Regulations 1987].

(4) The amount of any income foregone in a case to which either head (iii) of paragraph (2) (a) or paragraph (2)(b) applies shall be the income that the claimant could have received without purchasing an annuity had the funds held under the relevant scheme or retirement annuity contract been held under a personal pension scheme or occupational pension scheme where income withdrawal was available and shall be determined in the manner specified in paragraph (3).

(5) In paragraph (2), “money purchase benefits” has the meaning it has in the Pensions Scheme Act 1993^{M30}.

[^{F270}(5A) Where a person—

- (a) makes a claim for state pension credit on or after the issue of a tax credit closure notice and before the expiry of one month beginning with the deadline day specified in that notice; and
- (b) has not, at the time the notice is issued, made an application for retirement pension income to which they might expect to be entitled,

paragraphs (1), (1D) and (2) are not to apply for a period beginning with the first day on which the person is entitled to an award of state pension credit as a consequence of that claim and ending after 52 weeks or, if sooner, on the day the person ceases to be entitled to state pension credit.]

(6) [^{F271}Subject to [^{F272}the following paragraphs],] a person shall be treated as possessing income of which he has deprived himself for the purpose of securing entitlement to state pension credit or increasing the amount of that benefit.

[^{F273}(7) Paragraph (6) shall not apply in respect of the amount of an increase of pension or benefit where a person, having made an election in favour of that increase of pension or benefit under Schedule 5 or 5A to the 1992 Act or under Schedule 1 to the Graduated Retirement Benefit Regulations, changes that election in accordance with regulations made under Schedule 5 or 5A to that Act in favour of a lump sum.]

[^{F274}(7ZA) Paragraph (6) shall not apply in respect of the amount of an increase of pension where a person, having made a choice in favour of that increase of pension under section 8(2) of the Pensions Act 2014, alters that choice in favour of a lump sum, in accordance with Regulations made under section 8(7) of that Act.

(7ZB) Paragraph (6) shall not apply in respect of the amount of an increase of pension where a person, having made a choice in favour of that increase of pension in accordance with Regulations made under section 10 of the Pensions Act 2014 which include provision corresponding or similar to section 8(2) of that Act, alters that choice in favour of a lump sum, in accordance with Regulations made under section 10 of that Act which include provision corresponding or similar to Regulations made under section 8(7).]

[^{F275}(7A) Paragraph (6) shall not apply in respect of any amount of income other than earnings, or earnings of an employed earner, arising out of the [^{F276}claimant participating as a service user].]

[^{F273}(8) In paragraph (7), “lump sum” means a lump sum under Schedule 5 or 5A to the 1992 Act or under Schedule 1 to the Graduated Retirement Benefit Regulations.]

[^{F277}(8A) In paragraph (7ZA), “lump sum” means a lump sum under section 8 of the Pensions Act 2014.

(8B) In paragraph (7ZB), “lump sum” means a lump sum under Regulations made under section 10 of the Pensions Act 2014.]

Status: Point in time view as at 08/06/2024.

*Changes to legislation: There are currently no known outstanding effects for the
The State Pension Credit Regulations 2002. (See end of Document for details)*

[^{F278}(9) For the purposes of paragraph (6), a person is not to be regarded as depriving himself of income where—

- (a) his rights to benefits under a registered pension scheme are extinguished and in consequence of this he receives a payment from the scheme, and
- (b) that payment is a trivial commutation lump sum within the meaning given by paragraph 7 of Schedule 29 to the Finance Act 2004.

(10) In paragraph (9), "registered pension scheme" has the meaning given in section 150(2) of the Finance Act 2004.]

Textual Amendments

- F257** Reg. 18(1) substituted (2.10.2006) by The Social Security (Miscellaneous Amendments) (No. 4) Regulations 2006 (S.I. 2006/2378), regs. 1(3), **14(4)(a)**
- F258** Word in reg. 18(1)(a) substituted (coming into force in accordance with art. 1(2)(b) of the amending S.I.) by The Pensions Act 2014 (Consequential, Supplementary and Incidental Amendments) Order 2015 (S.I. 2015/1985), arts. 1(2)(b), **24(2)(a)**
- F259** Reg. 18(1A) inserted (2.10.2006) by The Social Security (Miscellaneous Amendments) (No. 4) Regulations 2006 (S.I. 2006/2378), regs. 1(3), **14(4)(a)**
- F260** Words in reg. 18(1A) substituted (1.10.2007) by The Social Security (Miscellaneous Amendments) (No. 5) Regulations 2007 (S.I. 2007/2618), regs. 1(1), **10(3)(a)**
- F261** Words in reg. 18(1A) substituted (8.6.2024) by The Social Security (State Pension Age Claimants: Closure of Tax Credits) (Amendment) Regulations 2024 (S.I. 2024/611), regs. 1(1), **4(4)(a)**
- F262** Reg. 18(1B) inserted (2.10.2006) by The Social Security (Miscellaneous Amendments) (No. 4) Regulations 2006 (S.I. 2006/2378), regs. 1(3), **14(4)(a)**
- F263** Reg. 18(1C)(1CA)(1CB) substituted for reg. 18(1C) (1.10.2007) by The Social Security (Miscellaneous Amendments) (No. 5) Regulations 2007 (S.I. 2007/2618), regs. 1(1), **10(3)(b)**
- F264** Words in reg. 18(1CA) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(5)**
- F265** Reg. 18(1D) inserted (2.10.2006) by The Social Security (Miscellaneous Amendments) (No. 4) Regulations 2006 (S.I. 2006/2378), regs. 1(3), **14(4)(a)**
- F266** Words in reg. 18(1D) inserted (8.6.2024) by The Social Security (State Pension Age Claimants: Closure of Tax Credits) (Amendment) Regulations 2024 (S.I. 2024/611), regs. 1(1), **4(4)(b)**
- F267** Words in reg. 18(2) inserted (8.6.2024) by The Social Security (State Pension Age Claimants: Closure of Tax Credits) (Amendment) Regulations 2024 (S.I. 2024/611), regs. 1(1), **4(4)(b)**
- F268** Words in reg. 18(2) substituted (6.4.2010) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2010 (S.I. 2010/641), regs. 1(1), **6(6)**
- F269** Words in reg. 18(3) substituted (16.11.2017) by The Social Security (Miscellaneous Amendments) (No. 4) Regulations 2017 (S.I. 2017/1015), regs. 1(2), **10(3)**
- F270** Reg. 18(5A) inserted (8.6.2024) by The Social Security (State Pension Age Claimants: Closure of Tax Credits) (Amendment) Regulations 2024 (S.I. 2024/611), regs. 1(1), **4(4)(c)**
- F271** Words in reg. 18(6) inserted (6.4.2006) by The Social Security (Deferral of Retirement Pensions, Shared Additional Pension and Graduated Retirement Benefit) (Miscellaneous Provisions) Regulations 2005 (S.I. 2005/2677), regs. 1(1), **13(3)(a)**
- F272** Words in reg. 18(6) substituted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by The Social Security (Miscellaneous Amendments) (No. 4) Regulations 2009 (S.I. 2009/2655), regs. 1(2)(c), **5(4)(a)**
- F273** Reg. 18(7)(8) added (6.4.2006) by The Social Security (Deferral of Retirement Pensions, Shared Additional Pension and Graduated Retirement Benefit) (Miscellaneous Provisions) Regulations 2005 (S.I. 2005/2677), regs. 1(1), **13(3)(b)**

- F274** Reg. 18(7ZA)(7ZB) inserted (coming into force in accordance with art. 1(2)(b) of the amending S.I.) by [The Pensions Act 2014 \(Consequential, Supplementary and Incidental Amendments\) Order 2015 \(S.I. 2015/1985\)](#), arts. 1(2)(b), **24(2)(b)**
- F275** Reg. 18(7A) added (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2009 \(S.I. 2009/2655\)](#), regs. 1(2)(c), **5(4)(b)**
- F276** Words in reg. 18(7A) substituted (28.4.2014) by [The Social Security \(Miscellaneous Amendments\) Regulations 2014 \(S.I. 2014/591\)](#), regs. 1, **7(4)**
- F277** Reg. 18(8A)(8B) inserted (coming into force in accordance with art. 1(2)(b) of the amending S.I.) by [The Pensions Act 2014 \(Consequential, Supplementary and Incidental Amendments\) Order 2015 \(S.I. 2015/1985\)](#), arts. 1(2)(b), **24(2)(c)**
- F278** Reg. 18(9)(10) inserted (2.10.2006) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2006 \(S.I. 2006/2378\)](#), regs. 1(3), **14(4)(b)**

Marginal Citations

- M30** 1993 c. 48; see section 181(1) of that Act.

[^{F279} Calculation of capital in the United Kingdom

19. Capital which a claimant possesses in the United Kingdom shall be calculated at its current market or surrender value less—

- (a) where there would be expenses attributable to sale, 10 per cent; and
- (b) the amount of any encumbrance secured on it.]

Textual Amendments

- F279** Reg. 19 substituted (1.10.2007) by [The Social Security \(Miscellaneous Amendments\) \(No. 5\) Regulations 2007 \(S.I. 2007/2618\)](#), regs. 1(1), **10(4)**

Calculation of capital outside the United Kingdom

20. Capital which a claimant possesses in a country outside the United Kingdom shall be calculated—

- (a) in a case where there is no prohibition in that country against the transfer to the United Kingdom of an amount equal to its current market or surrender value in that country, at that value;
- (b) in a case where there is such a prohibition, at the price which it would realise if sold in the United Kingdom to a willing buyer,

less, where there would be expenses attributable to sale, 10 per cent., and the amount of any encumbrance secured on it.

Notional capital

21.—[^{F280}(1) A claimant shall be treated as possessing capital of which he has deprived himself for the purpose of securing entitlement to state pension credit or increasing the amount of that benefit except to the extent that the capital which he is treated as possessing is reduced in accordance with regulation 22 (diminishing notional capital rule).]

[^{F281}(2) A person who disposes of a capital resource for the purpose of—

- (a) reducing or paying a debt owed by the claimant; or

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- (b) purchasing goods or services if the expenditure was reasonable in the circumstances of the claimant's case,

shall be regarded as not depriving himself of it.]

[^{F282}(3) Where a claimant stands in relation to a company in a position analogous to that of a sole owner or partner in the business of that company, he shall be treated as if he were such sole owner or partner and in such a case—

- (a) the value of his holding in that company shall, notwithstanding regulation 19 (calculation of capital), be disregarded; and
- (b) he shall, subject to paragraph (4), be treated as possessing an amount of capital equal to the value or, as the case may be, his share of the value of the capital of that company and the foregoing provisions of this Chapter shall apply for the purposes of calculating that amount as if it were actual capital which he does possess.

(4) For so long as a claimant undertakes activities in the course of the business of the company, the amount which he is treated as possessing under paragraph (3) shall be disregarded.

(5) Where under this regulation a person is treated as possessing capital, the amount of that capital shall be calculated in accordance with the provisions of this Part as if it were actual capital which he does possess.]

Textual Amendments

- F280** Reg. 21(1) substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 6**
- F281** Reg. 21(2) substituted (5.4.2004) by [The State Pension Credit \(Miscellaneous Amendments\) Regulations 2004 \(S.I. 2004/647\)](#), regs. 1, **3(5)**
- F282** Reg. 21(3)-(5) added (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(j)**

Diminishing notional capital rule

22.—(1) Where a claimant is treated as possessing capital under regulation 21(1) (notional capital), the amount which he is treated as possessing—

- (a) in the case of a week that is subsequent to—
- (i) the relevant week in respect of which the conditions set out in paragraph (2) are satisfied, or
- (ii) a week which follows that relevant week and which satisfies those conditions, shall be reduced by an amount determined under paragraph (2);
- (b) in the case of a week in respect of which sub-paragraph (1)(a) does not apply but where—
- (i) that week is a week subsequent to the relevant week, and
- (ii) that relevant week is a week in which the condition in paragraph (3) is satisfied, shall be reduced by the amount determined under paragraph (3).

(2) This paragraph applies to a benefit week where the claimant satisfies the conditions that—

- (a) he is in receipt of state pension credit; and
- (b) but for regulation [^{F283}21(1)], he would have received an additional amount of state pension credit in that benefit week;

and in such a case, the amount of the reduction for the purposes of paragraph (1)(a) shall be equal to that additional amount.

(3) Subject to paragraph (4), for the purposes of paragraph (1)(b) the condition is that the claimant would have been entitled to state pension credit in the relevant week, but for regulation [F²⁸³21(1)], and in such a case the amount of the reduction shall be equal to the aggregate of—

- (a) the amount of state pension credit to which the claimant would have been entitled in the relevant week but for regulation [F²⁸³21(1)];
- (b) the amount of housing benefit (if any) equal to the difference between his maximum housing benefit and the amount (if any) of housing benefit which he is awarded in respect of the benefit week, within the meaning of regulation 2(1) of the Housing Benefit (General) Regulations 1987 ^{M31} (interpretation), which includes the last day of the relevant week;
- (c) the amount of council tax benefit (if any) equal to the difference between his maximum council tax benefit and the amount (if any) of council tax benefit which he is awarded in respect of the benefit week which includes the last day of the relevant week, and for this purpose “benefit week” [F²⁸⁴] means a period of 7 consecutive days beginning on a Monday and ending on a Sunday].

(4) The amount determined under paragraph (3) shall be re-determined under that paragraph if the claimant makes a further claim for state pension credit and the conditions in paragraph (5) are satisfied, and in such a case—

- (a) sub-paragraphs (a) to (c) of paragraph (3) shall apply as if for the words “relevant week” there were substituted the words “relevant subsequent week”; and
- (b) subject to paragraph (6), the amount as re-determined shall have effect from the first week following the relevant subsequent week in question.

(5) The conditions are that—

- (a) a further claim is made 26 or more weeks after—
 - (i) the date on which the claimant made a claim for state pension credit in respect of which he was first treated as possessing the capital in question under regulation [F²⁸³21(1)]; or
 - (ii) in a case where there has been at least one re-determination in accordance with paragraph (4), the date on which he last made a claim for state pension credit which resulted in the weekly amount being re-determined; or
 - (iii) the date on which he last ceased to be in receipt of state pension credit, whichever last occurred; and

(b) the claimant would have been entitled to state pension credit but for regulation [F²⁸³21(1)].

(6) The amount as re-determined pursuant to paragraph (4) shall not have effect if it is less than the amount which applied in that case immediately before the re-determination and in such a case the higher amount shall continue to have effect.

(7) For the purpose of this regulation—

- (a) “relevant week” means the benefit week in which the capital in question of which the claimant has deprived himself within the meaning of regulation [F²⁸³21(1)]—
 - (i) was first taken into account for the purpose of determining his entitlement to state pension credit; or
 - (ii) was taken into account on a subsequent occasion for the purpose of determining or re-determining his entitlement to state pension credit on that subsequent occasion and that determination or re-determination resulted in his beginning to receive, or ceasing to receive, state pension credit;

and where more than one benefit week is identified by reference to heads (i) and (ii) of this sub-paragraph the later or latest such benefit week;

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- (b) “relevant subsequent week” means the benefit week which includes the day on which the further claim or, if more than one further claim had been made, the last such claim was made.

Textual Amendments

F283 Word in reg. 22 substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 7**

F284 Words in reg. 22(3)(c) substituted (1.4.2013) by [The Council Tax Benefit Abolition \(Consequential Provision\) Regulations 2013 \(S.I. 2013/458\)](#), reg. 1, **Sch. 2 para. 6**

Marginal Citations

M31 [S.I.1987/1971](#).

Capital jointly held

23. Where a claimant and one or more persons are beneficially entitled in possession to any capital asset they shall be treated as if each of them were entitled in possession to the whole beneficial interest therein in an equal share and the foregoing provisions of this Part shall apply for the purposes of calculating the amount of capital which the claimant is treated as possessing as if it were actual capital which the claimant does possess.

Income paid to third parties

24.—(1) Any payment of income, other than a payment specified in [^{F285}paragraphs (2) or (3)], to a third party in respect of the claimant shall be treated as possessed by the claimant.

(2) Paragraph (1) shall not apply in respect of a payment of income made under an occupational pension scheme or in respect of a pension or other periodical payment made under a personal pension scheme where—

- (a) a bankruptcy order has been made in respect of the person in respect of whom the payment has been made or, to Scotland, the estate of that person is subject to sequestration or a judicial factor has been appointed on that person’s estate under section 41 of the Solicitors (Scotland) Act 1980 ^{M32};
- (b) the payment is made to the trustee in bankruptcy or any other person acting on behalf of the creditors; and
- (c) the person referred to in sub-paragraph (a) and his partner does not possess, or is not treated as possessing, any other income apart from that payment.

[^{F286}(3) Paragraph (1) shall not apply in respect of any payment of income arising out of the [^{F287}claimant participating as a service user].]

Textual Amendments

F285 Words in reg. 24(1) substituted (31.10.2011) by [The Social Security \(Miscellaneous Amendments\) \(No. 3\) Regulations 2011 \(S.I. 2011/2425\)](#), regs. 1(2), **15(4)(a)**

F286 Reg. 24(3) inserted (31.10.2011) by [The Social Security \(Miscellaneous Amendments\) \(No. 3\) Regulations 2011 \(S.I. 2011/2425\)](#), regs. 1(2), **15(4)(b)**

F287 Words in reg. 24(3) substituted (28.4.2014) by [The Social Security \(Miscellaneous Amendments\) Regulations 2014 \(S.I. 2014/591\)](#), reg. 1, **7(5)**

Marginal Citations

M32 1980 c. 46.

[^{F288}Rounding of fractions

24A. Where any calculation under this Part results in a fraction of a penny that fraction shall, if it would be to the claimant's advantage, be treated as a penny; otherwise it shall be disregarded.]

Textual Amendments

F288 Reg. 24A inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(k)**

PART IV

Loss of benefit

Loss of benefit

25.—(1) The Social Security (Loss of Benefit) Regulations 2001 ^{M33} shall be amended in accordance with the following provisions of this regulation.

(2) In regulation 2 (disqualification period), in—

- (i) paragraph (1) (a)(iii) and paragraph (3) (c) after the words “jobseeker’s allowance”, insert “, state pension credit ”; and
- (ii) paragraph (1) (b)(iii) for the words “or jobseeker’s allowance”, substitute “ jobseeker’s allowance or state pension credit ”.

(3) After regulation 3, insert—

“ Reduction in state pension credit

3A.—(1) Subject to the following provisions of this regulation, state pension credit shall be payable in the case of an offender for any week comprised in the disqualification period or in the case of an offender’s family member for any week comprised in the relevant period, as if the rate of benefit were reduced—

- (a) where the offender or the offender’s family member is pregnant or seriously ill, by 20 per cent. of the relevant sum; or
- (b) where sub-paragraph (a) does not apply, by 40 per cent. of the relevant sum.

(2) In paragraph (1), the “relevant sum” is the amount applicable—

- (a) except where sub-paragraph (b) applies, in respect of a single claimant aged not less than 25 under paragraph 1(1) of Schedule 2 to the Income Support Regulations; or
- (b) if the claimant’s family member is the offender and the offender has not attained the age of 25, the amount applicable in respect of a person of the offender’s age under paragraph 1(1) of Part I of that Schedule,

on the first day of the disqualification period or, as the case may be, on the first day of the relevant period.

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the
The State Pension Credit Regulations 2002. (See end of Document for details)

(3) Payment of state pension credit shall not be reduced under this regulation to less than 10 pence per week.

(4) A reduction under paragraph (1) shall, if it is not a multiple of 5 pence, be rounded to the nearest such multiple or, if it is a multiple of 2.5 pence but not of 5 pence, to the next lower multiple of 5 pence.

(5) Where the rate of state pension credit payable to an offender or an offender's family member changes, the rules set out above for a reduction in the credit payable shall be applied to the new rate and any adjustment to the reduction shall take effect from the first day of the first benefit week to start after the date of change.

(6) In paragraph (5), "benefit week" has the same meaning as in regulation 1(2) of the State Pension Credit Regulations 2002.

(7) A person of a prescribed description for the purposes of the definition of "family" in section 137(1) of the Benefits Act as it applies for the purpose of this regulation is—

- (a) a person who is an additional spouse for the purposes of section 12(1) of the State Pension Credit Act 2002 ^{M34} (additional spouse in the case of polygamous marriages);
- (b) a person aged 16 or over who is treated as a child for the purposes of section 142 of the Benefits Act."

Marginal Citations

M33 [S.I. 2001/4022](#); the relevant amending Instrument is [S.I. 2002/486](#).

M34 [2002 c. 16](#).

Signed by authority of the Secretary of State for Work and Pensions.

Ian McCartney
Minister of State,
Department for Work and Pensions

SCHEDULE I

Regulation 6(4)

PART I

Circumstances in which persons are treated as being or not being severely disabled

Severe disablement

1.—(1) For the purposes of regulation 6(4) (additional amounts for persons severely disabled), the claimant is to be treated as being severely disabled if, and only if—

(a) in the case of a claimant who has no partner—

- (i) he is in receipt of attendance allowance [^{F289}, the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the 1992 Act^{F290},] the daily living component of personal independence payment at the standard or enhanced rate in accordance with section 78(3) of the 2012 Act^{F291}, the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the Disability Assistance for Working Age People (Scotland) Regulations 2022^{F292} or armed forces independence payment]; and
- (ii) no person who has attained the age of 18 is normally residing with the claimant, nor is the claimant normally residing with such a person, other than a person to whom paragraph 2 applies; and
- (iii) no person is entitled to and in receipt of an allowance under section 70 of the 1992 Act ([^{F293}carer's allowance]) [^{F294}or carer support payment]^{F295}, or has an award of universal credit which includes the carer element,] in respect of caring for him;

(b) in the case of a claimant who has a partner—

- (i) both partners are in receipt of attendance allowance^{F296}, the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the 1992 Act^{F297},] the daily living component of personal independence payment at the standard or enhanced rate in accordance with section 78(3) of the 2012 Act^{F298}, the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the Disability Assistance for Working Age People (Scotland) Regulations 2022^{F299} or armed forces independence payment]; and
- (ii) no person who has attained the age of 18 is normally residing with the partners, nor are the partners normally residing with such a person, other than a person to whom paragraph 2 applies;

and either a person is entitled to, and in receipt of, an allowance under section 70 of the 1992 Act [^{F300}or carer support payment]^{F301}, or has an award of universal credit which includes the carer element,] in respect of caring for one only of the partners or, as the case may be, no person is entitled to, and in receipt of, such an allowance [^{F302}under section 70 [^{F303}or carer support payment], or has an award of universal credit which includes the carer element,] in respect of caring for either partner;

(c) in the case of a claimant who has a partner and to whom head (b) does not apply—

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the
The State Pension Credit Regulations 2002. (See end of Document for details)

- (i) either the claimant or his partner is in receipt of attendance allowance^[F304], the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the 1992 Act ^[F305], the daily living component of personal independence payment at the standard or enhanced rate in accordance with section 78(3) of the 2012 Act^[F306], the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the Disability Assistance for Working Age People (Scotland) Regulations 2022^[F307] or armed forces independence payment; and
 - ^[F308](ii) the other partner is certified as severely sight impaired or blind by a consultant ophthalmologist; and
 - (iii) no person who has attained the age of 18 is normally residing with the partners, nor are the partners normally residing with such a person, other than a person to whom paragraph 2 applies; and
 - (iv) no person is entitled to and in receipt of an allowance under section 70 of the 1992 Act ^[F309] or carer support payment^[F310], or has an award of universal credit which includes the carer element, in respect of caring for the person to whom head (c) (i) above applies.
- (2) A person shall be treated—
- (a) for the purposes of sub-paragraph (1) as being in receipt of attendance allowance or, as the case may be ^[F311], the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the 1992 Act ^[F312], the daily living component of personal independence payment at the standard or enhanced rate in accordance with section 78(3) of the 2012 Act^[F313], the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the Disability Assistance for Working Age People (Scotland) Regulations 2022^[F314] or armed forces independence payment], for any period—
 - (i) before an award is made but in respect of which the allowance ^[F315] or payment] is awarded; or
 - (ii) not covered by an award but in respect of which a payment is made in lieu of an award;
 - (b) for the purposes of sub-paragraph (1)(b) as being in receipt of attendance allowance or the care component of disability living allowance at the highest or middle rate prescribed in accordance section ^[F316]72(3)] of the 1992 Act if he would, but for his being a patient for a period exceeding 28 days, be so in receipt;
 - ^[F317](ba) for the purposes of sub-paragraph (1)(b) as being in receipt of the daily living component of personal independence payment at the standard or enhanced rate in accordance with section 78 of the 2012 Act if he would, but for regulations made under section 86(1) (hospital in-patients) of that Act, be so in receipt;]
 - ^[F318](bb) for the purposes of sub-paragraph (1)(b) as being in receipt of the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the Disability Assistance for Working Age People (Scotland) Regulations 2022, if that person would, but for regulation 28 (effect of admission to hospital on ongoing entitlement to Adult Disability Payment) of those Regulations, be so in receipt;]
 - (c) for the purposes of sub-paragraph (1), as not being in receipt of an allowance under section 70 of the 1992 Act ^[F319] or carer support payment^[F320], or as having an award of universal credit which includes the carer element,] for any period before ^[F321]the date on which the award is first paid].

[^{F322}(3) For the purposes of sub-paragraph (1)(c)(ii), a person who has ceased to be certified as severely sight impaired or blind on regaining his eyesight shall nevertheless be treated as severely sight impaired or blind, as the case may be, and as satisfying the requirements set out in that sub-paragraph for a period of 28 weeks following the date on which he ceased to be so certified.]

[^{F323}(4) For the purposes of this paragraph, a person has an award of universal credit which includes the carer element if the person has an award of universal credit which includes an amount which is the carer element under regulation 29 of the Universal Credit Regulations 2013.]

Textual Amendments

- F289** Words in Sch. I para. 1(1)(a)(i) substituted (8.4.2013) by [The Personal Independence Payment \(Supplementary Provisions and Consequential Amendments\) Regulations 2013 \(S.I. 2013/388\)](#), reg. 2, **Sch. para. 27(4)(a)(i)**
- F290** Sch. I para. 1(1)(a)(i): comma substituted for word (21.3.2022) by [The Social Security \(Disability Assistance for Working Age People\) \(Consequential Amendments\) Order 2022 \(S.I. 2022/177\)](#), arts. 1(2), **8(3)(a)(i)**
- F291** Words in Sch. I para. 1(1)(a)(i) inserted (21.3.2022) by [The Social Security \(Disability Assistance for Working Age People\) \(Consequential Amendments\) Order 2022 \(S.I. 2022/177\)](#), arts. 1(2), **8(3)(a)(ii)**
- F292** Words in Sch. I para. 1(1)(a)(i) inserted (8.4.2013) by [The Armed Forces and Reserve Forces Compensation Scheme \(Consequential Provisions: Subordinate Legislation\) Order 2013 \(S.I. 2013/591\)](#), art. 2(2), **Sch. para. 23(4)(a)(i)**
- F293** Words in Sch. I para. 1(1)(a)(iii) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(8)(a)**
- F294** Words in Sch. I para. 1(1)(a)(iii) inserted (19.11.2023) by [The Carer's Assistance \(Carer Support Payment\) \(Scotland\) Regulations 2023 \(Consequential Amendments\) Order 2023 \(S.I. 2023/1218\)](#), arts. 1(2), **14(6)(a)(i)**
- F295** Words in Sch. I para. 1(1)(a)(iii) inserted (with effect in accordance with reg. 1(3) of the amending S.I.) by [The Universal Credit and Miscellaneous Amendments Regulations 2015 \(S.I. 2015/1754\)](#), regs. 1(1), **16(3)(a)**
- F296** Words in Sch. I para. 1(1)(b)(i) substituted (8.4.2013) by [The Personal Independence Payment \(Supplementary Provisions and Consequential Amendments\) Regulations 2013 \(S.I. 2013/388\)](#), reg. 2, **Sch. para. 27(4)(a)(ii)**
- F297** Sch. I para. 1(1)(b)(i): comma substituted for word (21.3.2022) by [The Social Security \(Disability Assistance for Working Age People\) \(Consequential Amendments\) Order 2022 \(S.I. 2022/177\)](#), arts. 1(2), **8(3)(b)(i)**
- F298** Words in Sch. I para. 1(1)(b)(i) inserted (21.3.2022) by [The Social Security \(Disability Assistance for Working Age People\) \(Consequential Amendments\) Order 2022 \(S.I. 2022/177\)](#), arts. 1(2), **8(3)(b)(ii)**
- F299** Words in Sch. I para. 1(1)(b)(i) inserted (8.4.2013) by [The Armed Forces and Reserve Forces Compensation Scheme \(Consequential Provisions: Subordinate Legislation\) Order 2013 \(S.I. 2013/591\)](#), art. 2(2), **Sch. para. 23(4)(a)(ii)**
- F300** Words in Sch. I para. 1(1) inserted (19.11.2023) by [The Carer's Assistance \(Carer Support Payment\) \(Scotland\) Regulations 2023 \(Consequential Amendments\) Order 2023 \(S.I. 2023/1218\)](#), arts. 1(2), **14(6)(a)(ii)(aa)**
- F301** Words in Sch. I para. 1(1)(b) inserted (with effect in accordance with reg. 1(3) of the amending S.I.) by [The Universal Credit and Miscellaneous Amendments Regulations 2015 \(S.I. 2015/1754\)](#), regs. 1(1), **16(3)(b)(i)**
- F302** Words in Sch. I para. 1(1)(b) inserted (with effect in accordance with reg. 1(3) of the amending S.I.) by [The Universal Credit and Miscellaneous Amendments Regulations 2015 \(S.I. 2015/1754\)](#), regs. 1(1), **16(3)(b)(ii)**
- F303** Words in Sch. I para. 1(1) inserted (19.11.2023) by [The Carer's Assistance \(Carer Support Payment\) \(Scotland\) Regulations 2023 \(Consequential Amendments\) Order 2023 \(S.I. 2023/1218\)](#), arts. 1(2), **14(6)(a)(ii)(bb)**

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- F304** Words in Sch. I para. 1(1)(c)(i) substituted (8.4.2013) by The Personal Independence Payment (Supplementary Provisions and Consequential Amendments) Regulations 2013 (S.I. 2013/388), reg. 2, **Sch. para. 27(4)(a)(iii)**
- F305** Sch. I para. 1(1)(c)(i): comma substituted for word (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(3)(c)(i)**
- F306** Words in Sch. I para. 1(1)(c)(i) inserted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(3)(c)(ii)**
- F307** Words in Sch. I para. 1(1)(c)(i) inserted (8.4.2013) by The Armed Forces and Reserve Forces Compensation Scheme (Consequential Provisions: Subordinate Legislation) Order 2013 (S.I. 2013/591), art. 2(2), **Sch. para. 23(4)(a)(iii)**
- F308** Sch. I para. 1(1)(c)(ii) substituted (with effect in accordance with reg. 1(2) of the amending S.I.) by The Universal Credit and Miscellaneous Amendments (No.2) Regulations 2014 (S.I. 2014/2888), regs. 1(1), **3(4)(a)(i)(aa)**
- F309** Words in Sch. I para. 1(1)(c)(iv) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(6)(a)(iii)**
- F310** Words in Sch. I para. 1(1)(c)(iv) inserted (with effect in accordance with reg. 1(3) of the amending S.I.) by The Universal Credit and Miscellaneous Amendments Regulations 2015 (S.I. 2015/1754), regs. 1(1), **16(3)(c)**
- F311** Words in Sch. I para. 1(2)(a) substituted (8.4.2013) by The Personal Independence Payment (Supplementary Provisions and Consequential Amendments) Regulations 2013 (S.I. 2013/388), reg. 2, **Sch. para. 27(4)(a)(iv)**
- F312** Sch. I para. 1(2)(a): comma substituted for word (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(3)(d)(i)**
- F313** Words in Sch. I para. 1(2)(a) inserted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(3)(d)(ii)**
- F314** Words in Sch. I para. 1(2)(a) inserted (8.4.2013) by The Armed Forces and Reserve Forces Compensation Scheme (Consequential Provisions: Subordinate Legislation) Order 2013 (S.I. 2013/591), art. 2(2), **Sch. para. 23(4)(a)(iv)**
- F315** Words in Sch. I para. 1(2)(a)(i) inserted (8.4.2013) by The Personal Independence Payment (Supplementary Provisions and Consequential Amendments) Regulations 2013 (S.I. 2013/388), reg. 2, **Sch. para. 27(4)(a)(v)**
- F316** Word in Sch. I para. 1(2)(b) substituted (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 8(a)(i)**
- F317** Sch. I para. 1(2)(ba) inserted (8.4.2013) by The Personal Independence Payment (Supplementary Provisions and Consequential Amendments) Regulations 2013 (S.I. 2013/388), reg. 2, **Sch. para. 27(4)(a)(vi)**
- F318** Sch. I para. 1(2)(bb) inserted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(3)(e)**
- F319** Words in Sch. I para. 1(2)(c) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(6)(a)(iv)**
- F320** Words in Sch. I para. 1(2)(c) inserted (with effect in accordance with reg. 1(3) of the amending S.I.) by The Universal Credit and Miscellaneous Amendments Regulations 2015 (S.I. 2015/1754), regs. 1(1), **16(3)(d)**
- F321** Words in Sch. I para. 1(2)(c) substituted (2.4.2007) by The Social Security (Miscellaneous Amendments) Regulations 2007 (S.I. 2007/719), regs. 1(2), **4(2)**
- F322** Sch. I para. 1(3) substituted (with effect in accordance with reg. 1(2) of the amending S.I.) by The Universal Credit and Miscellaneous Amendments (No.2) Regulations 2014 (S.I. 2014/2888), regs. 1(1), **3(4)(a)(i)(bb)**

F323 Sch. I para. 1(4) inserted (with effect in accordance with reg. 1(3) of the amending S.I.) by The Universal Credit and Miscellaneous Amendments Regulations 2015 (S.I. 2015/1754), regs. 1(1), **16(3)(e)**

Persons residing with the claimant whose presence is ignored

2.—(1) For the purposes of paragraph 1(1)(a)(ii), (b)(ii) and (c)(iii), this paragraph applies to the persons specified in the following sub-paragraphs.

(2) A person who—

(a) is in receipt of attendance allowance^[F324], the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the 1992 Act ^[F325], the daily living component of personal independence payment at the standard or enhanced rate in accordance with section 78(3) of the 2012 Act^[F326], the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the Disability Assistance for Working Age People (Scotland) Regulations 2022^[F327] or armed forces independence payment;

^[F328](b) is certified as severely sight impaired or blind by a consultant ophthalmologist;

^[F329](c) is no longer certified as severely sight impaired or blind in accordance with head (b) but was so certified not more than 28 weeks earlier;

(d) lives with the claimant in order to care for him or his partner and is engaged by a charitable or voluntary organisation which makes a charge to the claimant or his partner for the services provided by that person;

(e) is a partner of a person to whom head (d) above applies; or

(f) is a person who is ^[F330]a qualifying young person ^[F331]within the meaning of regulation 4A^[F332] or] child ^[F332]as defined in section 40 of the 2012 Act].

(3) Subject to sub-paragraph (4), a person who joins the claimant's household for the first time in order to care for the claimant or his partner and immediately before he joined the household, the claimant or his partner was treated as being severely disabled.

(4) Sub-paragraph (3) applies only for the first 12 weeks following the date on which the person first joins the claimant's household.

(5) A person who is not a close relative of the claimant or his partner and—

(a) who is liable to make payments on a commercial basis to the claimant or his partner in respect of his occupation of the dwelling;

(b) to whom the claimant or his partner is liable to make payments on a commercial basis in respect of his occupation of that person's dwelling; or

(c) who is a member of the household of a person to whom head (a) or (b) applies.

(6) Subject to paragraph 3(3), a person who jointly occupies the claimant's dwelling and who is either—

(a) co-owner of that dwelling with the claimant or the claimant's ^[F333]partner] (whether or not there are other co-owners); or

(b) jointly liable with the claimant or the claimant's partner to make payments to a landlord in respect of his occupation of that dwelling.

(7) Subject to paragraph 3(3), a person who is a partner of a person to whom sub-paragraph (6) applies.

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the State Pension Credit Regulations 2002. (See end of Document for details)

Textual Amendments

- F324** Words in Sch. I para. 2(2)(a) substituted (8.4.2013) by [The Personal Independence Payment \(Supplementary Provisions and Consequential Amendments\) Regulations 2013 \(S.I. 2013/388\)](#), reg. 2, [Sch. para. 27\(4\)\(b\)](#)
- F325** Sch. I para. 2(2)(a): comma substituted for word (21.3.2022) by [The Social Security \(Disability Assistance for Working Age People\) \(Consequential Amendments\) Order 2022 \(S.I. 2022/177\)](#), arts. 1(2), [8\(3\)\(f\)\(i\)](#)
- F326** Words in Sch. I para. 2(2)(a) inserted (21.3.2022) by [The Social Security \(Disability Assistance for Working Age People\) \(Consequential Amendments\) Order 2022 \(S.I. 2022/177\)](#), arts. 1(2), [8\(3\)\(f\)\(ii\)](#)
- F327** Words in Sch. I para. 2(2)(a) inserted (8.4.2013) by [The Armed Forces and Reserve Forces Compensation Scheme \(Consequential Provisions: Subordinate Legislation\) Order 2013 \(S.I. 2013/591\)](#), art. 2(2), [Sch. para. 23\(4\)\(b\)](#)
- F328** Sch. I para. 2(2)(b) substituted (with effect in accordance with reg. 1(2) of the amending S.I.) by [The Universal Credit and Miscellaneous Amendments \(No.2\) Regulations 2014 \(S.I. 2014/2888\)](#), regs. 1(1), [3\(4\)\(a\)\(ii\)\(aa\)](#)
- F329** Sch. I para. 2(2)(c) substituted (with effect in accordance with reg. 1(2) of the amending S.I.) by [The Universal Credit and Miscellaneous Amendments \(No.2\) Regulations 2014 \(S.I. 2014/2888\)](#), regs. 1(1), [3\(4\)\(a\)\(ii\)\(bb\)](#)
- F330** Words in Sch. I para. 2(2)(f) substituted (10.4.2006) by [The Social Security \(Young Persons\) Amendment Regulations 2006 \(S.I. 2006/718\)](#), regs. 1(2)(a), [6\(3\)](#)
- F331** Words in Sch. I para. 2(2)(f) inserted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, [4\(7\)](#) (with reg. 5(3))
- F332** Words in Sch. I para. 2(2)(f) substituted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, [4\(7\)](#) (with reg. 5(3))
- F333** Word in Sch. I para. 2(6)(a) substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), [Sch. para. 8\(a\)\(ii\)](#)

3.—(1) For the purposes of paragraphs 1 and 2, a person resides with another only if they share any accommodation except a bathroom, a lavatory or a communal area, but not if each person is separately liable to make payments in respect of his occupation of the dwelling to the landlord.

(2) In sub-paragraph (1), “communal area” means any area (other than rooms) of common access (including halls and passageways) and rooms of common use in sheltered accommodation.

(3) Paragraph 2(6) and (7) applies to a person who is a close relative of the claimant or his partner only if the claimant or his partner’s co-ownership, or joint liability to make payments to a landlord in respect of his occupation, of the dwelling arose either before 11th April 1988, or, if later, on or before the date upon which the claimant or the claimant’s partner first occupied the dwelling in question.

PART II

Amount applicable for carers

4.—(1) For the purposes of regulation 6(6)(a), this paragraph is satisfied if any of the requirements specified in sub-paragraphs (2) to (4) are met.

(2) A claimant is, or in the case of partners either partner is, or both partners are, entitled to an allowance under section 70 of the 1992 Act (^{F334}carer’s allowance) [^{F335}or carer support payment].

(3) Where an additional amount has been awarded under regulation 6(6)(a) but

- (a) the person in respect of whose care the allowance [^{F336}or payment] has been awarded dies;
or
- (b) the person in respect of whom the additional amount was awarded ceases to be entitled or ceases to be treated as entitled to the allowance [^{F336}or payment],

this paragraph shall be treated as satisfied for a period of 8 weeks from the relevant date specified in sub-paragraph (4).

- (4) The relevant date for the purposes of [^{F337}sub-paragraph (3) is] —
 - (a) the Sunday following the death of the person in respect of whose care the allowance [^{F338}or payment] has been awarded (or beginning with the date of death if the death occurred on a Sunday);
 - (b) where sub-paragraph (a) does not apply, the date on which the person who has been entitled to the allowance [^{F338}or payment] ceases to be entitled to that allowance [^{F339}or payment].

Textual Amendments

- F334** Words in Sch. I para. 4(2) substituted (6.10.2003) by The State Pension Credit (Transitional and Miscellaneous Provisions) Amendment Regulations 2003 (S.I. 2003/2274), regs. 1, **2(8)(b)**
- F335** Words in Sch. I para. 4(2) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(6)(b)(i)**
- F336** Words in Sch. I para. 4(3) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(6)(b)(ii)**
- F337** Words in Sch. I para. 4(4) substituted (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 8(b)**
- F338** Words in Sch. I para. 4(4) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(6)(b)(iii)(aa)**
- F339** Words in Sch. I para. 4(4) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(6)(b)(iii)(bb)**

5. For the purposes of paragraph 4, a person shall be treated as being entitled to and in receipt of an allowance under section 70 of the 1992 Act [^{F340}or carer support payment] for any period not covered by an award but in respect of which a payment is made in lieu of an award.

Textual Amendments

- F340** Words in Sch. I para. 5 inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(6)(c)**

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

PART III

Amount applicable for former claimants of income support^{F341}, income-based jobseeker's allowance or income-related employment and support allowance]

Textual Amendments

F341 Words in Sch. I para. 6 heading substituted (27.10.2008) by [The Employment and Support Allowance \(Consequential Provisions\) \(No. 2\) Regulations 2008 \(S.I. 2008/1554\)](#), regs. 1(2)(b), [4\(7\)\(a\)](#)

6.—(1) If on the relevant day the relevant amount exceeds the provisional amount, an additional amount (“the transitional amount”) equal to the difference shall be applicable to a claimant to whom sub-paragraph (2) applies.

(2) This sub-paragraph applies to a claimant who, in respect of the day before the relevant day, was entitled to either income support^{F342}, an income-based jobseeker's allowance or an income-related employment and support allowance].

(3) The relevant day is the day in respect of which the claimant is first entitled to state pension credit.

(4) The provisional amount means the amount of the appropriate minimum guarantee applicable to the claimant on the relevant day but for this paragraph.

(5) The relevant amount means the amount which, on the day before the relevant day, was the claimant's applicable amount—

- (a) for the purposes of determining his entitlement to income support; ^{F343} ...
- (b) for the purpose of determining his entitlement to an income-based jobseeker's allowance^{F344}; or
- (c) for the purposes of determining his entitlement to income-related employment and support allowance,]

less any of the following amounts included in it—

- (i) any amount determined in accordance with paragraph 2 of Schedule 2 to the Income Support Regulations or paragraph 2 of Schedule 1 to the Jobseeker's Allowance Regulations;
- (ii) any amount by way of a residential allowance applicable in accordance with paragraph 2A of Schedule 2 to the Income Support Regulations or paragraph 3 of Schedule 1 to the Jobseeker's Allowance Regulations;
- (iii) any amount by way of family premium applicable in accordance with paragraph 3 of Schedule 2 to the Income Support Regulations or paragraph 4 of Schedule 1 to the Jobseeker's Allowance Regulations;
- (iv) any amount by way of disabled child premium applicable in accordance with paragraph 14 of Schedule 2 to the Income Support Regulations or paragraph 16 of Schedule 1 to the Jobseeker's Allowance Regulations; and
- (v) any amount in respect of a person other than the claimant or his partner by way of enhanced disability premium applicable in accordance with paragraph 13A of Schedule 2 to the Income Support Regulations^{F345}, paragraph 7 of Schedule 4 to the Employment and Support Allowance Regulations] or paragraph 15A of Schedule 1 to the Jobseeker's Allowance Regulations^{M35}.

(6) In determining the relevant amount under sub-paragraph (5), the applicable amount shall be increased by an amount equal to the amount (if any) payable to the claimant in accordance

with Part II of the Income Support (Transitional) Regulations 1987^{M36} (transitional protection) or regulation 87(1) of the Jobseeker's Allowance Regulations (transitional supplement to income-based jobseeker's allowance).

(7) If—

- (a) paragraph 1 of Schedule 7 to the Income Support Regulations or paragraph 1 of Schedule 5 to the Jobseeker's Allowance [^{F346}Regulations] applied to the claimant or his partner on the day before the relevant day; but
- (b) paragraph 2(2) of Schedule 3 does not apply to the claimant or his partner on the relevant day;

then for the purposes of this paragraph the relevant amount shall be determined on the assumption that the provision referred to in sub-paragraph (7)(a) did not apply in his case.

(8) Subject to sub-paragraph (9), the transitional amount shall—

- (a) be reduced by a sum equal to the amount (if any) by which the appropriate minimum guarantee increases after the relevant day;
- (b) cease to be included in the claimant's appropriate minimum guarantee from the day on which—
 - (i) the sum mentioned in head (a) above equals or exceeds the transitional amount; or
 - (ii) the claimant or the claimant's partner ceases to be entitled to state pension credit.

(9) For the purposes of sub-paragraph (8), there shall be disregarded—

- (a) any break in entitlement not exceeding 8 weeks; and
- ^{F347}(b) any amount by which the appropriate minimum guarantee of a patient is increased on 10th April 2006 by virtue of the substitution of paragraph 2 of Schedule 3.]

^{F348}(10) This sub-paragraph applies where the relevant amount included an amount in respect of housing costs relating to a loan—

- (a) which is treated as a qualifying loan by virtue of regulation 3 of the Income Support (General) Amendment and Transitional Regulations 1995 or paragraph 18(2) of Schedule 2 to the Jobseeker's Allowance Regulations [^{F349}or paragraph 20(2) of Schedule 6 to the Employment and Support Allowance Regulations]; or
- (b) the appropriate amount of which was determined in accordance with paragraph 7(6C) of Schedule 3 to the Income Support Regulations as in force prior to 10th April 1995 and maintained in force by regulation 28(1) of the Income-related Benefits Schemes (Miscellaneous Amendments) Regulations 1995.

(11) Where sub-paragraph (10) applies, the transitional amount shall be calculated or, as the case may be, recalculated, on the relevant anniversary date determined in accordance with paragraph 7(4C) of Schedule II ("the relevant anniversary date") on the basis that the provisional amount on the relevant day included, in respect of housing costs, the amount calculated in accordance with paragraph 7(1) of Schedule II as applying from the relevant anniversary date and not the amount in respect of housing costs determined on the basis of the amount of the loan calculated in accordance with paragraph 7(4A) of that Schedule.

(12) The transitional amount as calculated in accordance with sub-paragraph (11) shall only be applicable from the relevant anniversary date.]

Textual Amendments

F342 Words in Sch. I para. 6(2) substituted (27.10.2008) by [The Employment and Support Allowance \(Consequential Provisions\) \(No. 2\) Regulations 2008 \(S.I. 2008/1554\)](#), regs. 1(2)(b), **4(7)(b)**

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- F343** Word in Sch. I para. 6(5)(a) omitted (27.10.2008) by virtue of The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(7)(c)(i)**
- F344** Sch. I para. 6(5)(c) and word inserted (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(7)(c)(ii)**
- F345** Words in Sch. I para. 6(5)(v) inserted (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(7)(c)(iii)**
- F346** Word in Sch. I para. 6(7)(a) inserted (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 8(c)(i)**
- F347** Sch. I para. 6(9)(b) substituted (10.4.2006) by The Social Security (Miscellaneous Amendments) Regulations 2006 (S.I. 2006/588), regs. 1(8), **4(3)**
- F348** Sch. I para. 6(10) - (12) added (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 8(c)(ii)**
- F349** Words in Sch. I para. 6(10)(a) inserted (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(7)(d)**

Marginal Citations

- M35** The relevant amending Instrument is [S.I.2000/2629](#).
- M36** [S.I.1987/1969](#); the relevant amending Instruments are [S.I.1988/521](#) and 670, 1989/1626 and 1991/1600.

SCHEDULE II

Regulation 6(6)(c)

HOUSING COSTS

Housing costs

1.—(1) Subject to the following provisions of this Schedule, the housing costs applicable to a claimant in accordance with regulation 6(6)(c) are those costs—

- (a) which the claimant or, if he has a partner, his partner is, in accordance with paragraph 3, liable to meet in respect of the dwelling occupied as the home which he or his partner is treated as occupying; and
- (b) which qualify under ^{F350}under paragraph 13].

^{F351}(2)

(3) For the purposes of sub-paragraph (2)(a), a person shall not cease to be a disabled person on account of his being disqualified for receiving benefit or treated as capable of work by virtue of the operation of section 171E of the 1992 Act ^{M37} (incapacity for work, disqualification etc.) [^{F352}or disqualified for receiving employment and support allowance or treated as not having limited capability for work in accordance with regulations made under section 18 of the Welfare Reform Act (disqualification)].

(4) In this Schedule, “non-dependant” means any person, except someone to whom sub-paragraph (5), (6) or (7) applies, who normally resides with the claimant.

(5) This sub-paragraph applies to—

- (a) a partner of the claimant or any person under the age of [^{F353}20] for whom the claimant or the claimant’s partner is responsible;
- (b) a person who lives with the claimant in order to care for him or for the claimant’s partner and who is engaged for that purpose by a charitable or voluntary organisation which makes a charge to the claimant or the claimant’s partner for the care provided by that person;
- (c) the partner of a person to whom head (b) above applies.

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(6) This sub-paragraph applies to a person, other than a close relative of the claimant or the claimant's partner,—

(a) who is liable to make payments on a commercial basis to the claimant or the claimant's partner in respect of his occupation of the claimant's dwelling; [^{F354}or]

^{F355}(b)

(c) who is a member of the household of a person to whom head (a) ^{F356}... above applies.

(7) This sub-paragraph applies to—

(a) a person who jointly occupies the claimant's dwelling and who is either—

(i) co-owner of that dwelling with the claimant or the claimant's partners (whether or not there are other co-owners); or

(ii) jointly liable with the claimant or the claimant's partner to make payments to a landlord in respect of his occupation of that dwelling;

(b) a partner of a person to whom head (a) above applies.

(8) For the purpose of sub-paragraphs (4) to (7) a person resides with another only if they share any accommodation except a bathroom, a lavatory or a communal area but not if each person is separately liable to make payments in respect of his occupation of the dwelling to the landlord.

(9) In sub-paragraph (8), "communal area" means any area (other than rooms) of common access (including halls and passageways) and rooms of common use in sheltered accommodation.

Textual Amendments

F350 Words in Sch. II para. 1(1)(b) substituted (with effect in accordance with regs.19 - 21 of the amending S.I.) by [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(a)(i)**

F351 Sch. II para. 1(2) omitted (with effect in accordance with regs.19 - 21 of the amending S.I.) by virtue of [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(a)(ii)**

F352 Words in Sch. II para. 1(3) added (27.10.2008) by [The Employment and Support Allowance \(Consequential Provisions\) \(No. 2\) Regulations 2008 \(S.I. 2008/1554\)](#), regs. 1(2)(b), **4(8)(a)(ii)**

F353 Word in Sch. II para. 1(5)(a) substituted (10.4.2006) by [The Social Security \(Young Persons\) Amendment Regulations 2006 \(S.I. 2006/718\)](#), regs. 1(2)(a), **6(4)(b)**

F354 Word in Sch. II para. 1(6)(a) inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 9(b)(i)**

F355 Sch. II para. 1(6)(b) omitted (6.10.2003) by virtue of [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 9(b)(ii)**

F356 Words in Sch. II para. 1(6)(c) omitted (6.10.2003) by virtue of [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 9(b)(iii)**

Marginal Citations

M37 Section 171E was inserted by section 6 of the [Social Security \(Incapacity for Work\) Act 1994 \(c. 18\)](#).

Remunerative work

2.—(1) Subject to the following provisions of this paragraph, a person shall be treated for the purposes of this Schedule as engaged in remunerative work if he is engaged, or, where his hours

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of work fluctuate, he is engaged on average, for not less than 16 hours a week, in work for which payment is made or which is done in expectation of payment.

(2) Subject to sub-paragraph (3), in determining the number of hours for which a person is engaged in work where his hours of work fluctuate, regard shall be had to the average of hours worked over—

- (a) if there is a recognisable cycle of work, the period of one complete cycle (including, where the cycle involves periods in which the person does no work, those periods but disregarding any other absences);
- (b) in any other case, the period of 5 weeks immediately prior to the date of claim, or such other length of time as may, in the particular case, enable the person's weekly average hours of work to be determined more accurately.

(3) Where, for the purposes of sub-paragraph (2)(a), a person's recognisable cycle of work at a school, other educational establishment or other place of employment is one year and includes periods of school holidays or similar vacations during which he does not work, those periods and any other periods not forming part of such holidays or vacations during which he is not required to work shall be disregarded in establishing the average hours for which he is engaged in work.

(4) Where no recognisable cycle has been established in respect of a person's work, regard shall be had to the number of hours or, where those hours will fluctuate, the average of the hours, which he is expected to work in a week.

(5) A person shall be treated as engaged in remunerative work during any period for which he is absent from work referred to in sub-paragraph (1) if the absence is either without good cause or by reason of a recognised, customary or other holiday.

(6) A person on income support or an income-based jobseeker's allowance for more than 3 days in any benefit week shall be treated as not being in remunerative work in that week.

(7) A person shall not be treated as engaged in remunerative work on any day on which the person is on maternity leave [^{F357}, paternity leave [^{F358}, shared parental leave][^{F359}, parental bereavement leave] or adoption leave,] or is absent from work because he is ill.

(8) A person shall not be treated as engaged in remunerative work on any day on which he is engaged in an activity in respect of which—

- (a) a sports award has been made, or is to be made, to him; and
- (b) no other payment is made or is expected to be made to him [^{F360},

and for the purposes of this sub-paragraph, "sports award" means an award made by one of the Sports Councils named in section 23(2) of the National Lottery etc. Act 1993 out of sums allocated to it for distribution under that section]

(9) In this paragraph "benefit week"—

- (a) in relation to income support, has the same meaning as in regulation 2(1) of the Income Support Regulations;
- (b) in relation to jobseeker's allowance, has the same meaning as in regulation 1(3) of the Jobseeker's Allowance Regulations.

Textual Amendments

F357 Words in Sch. 2 para. 2(7) inserted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(9)(a)**

F358 Words in Sch. 2 para. 2(7) inserted (31.12.2014) by [The Shared Parental Leave and Statutory Shared Parental Pay \(Consequential Amendments to Subordinate Legislation\) Order 2014 \(S.I. 2014/3255\)](#), arts. 1(2), **10(5)**

F359 Words in Sch. 2 para. 2(7) inserted (6.4.2020) by [The Parental Bereavement Leave and Pay \(Consequential Amendments to Subordinate Legislation\) Regulations 2020 \(S.I. 2020/354\)](#), regs. 1, 10(5)

F360 Words in Sch. 2 para. 2(8) added (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 9(c)**

Circumstances in which a person is liable to meet housing costs

3. A person is liable to meet housing costs where—
- (a) the liability falls upon him or his partner but not where the liability is to a member of the same household as the person on whom the liability falls;
 - (b) because the person liable to meet the housing costs is not meeting them, the claimant has to meet those costs in order to continue to live in the dwelling occupied as the home and it is reasonable in all the circumstances to treat the claimant as liable to meet those costs;
 - (c) he in practice shares the housing costs with other members of the household none of whom are close relatives either of the claimant or his partner, and
 - (i) one or more of those members is liable to meet those costs, and
 - (ii) it is reasonable in the circumstances to treat him as sharing responsibility.

Circumstances in which a person is to be treated as occupying a dwelling as his home

4.—(1) Subject to the following provisions of this paragraph, a person shall be treated as occupying as his home the dwelling normally occupied as his home by himself or, if he has a partner, by himself and his partner, and he shall not be treated as occupying any other dwelling as his home.

(2) In determining whether a dwelling is the dwelling normally occupied as the claimant's home for the purposes of sub-paragraph (1) regard shall be had to any other dwelling occupied by the claimant or by him and his partner whether or not that other dwelling is in Great Britain.

(3) Subject to sub-paragraph (4), where a claimant who has no partner is a full-time student or is on a training course and is liable to make payments (including payments of mortgage interest or, in Scotland, payments under heritable securities or, in either case, analogous payments) in respect of either (but not both) the dwelling which he occupies for the purpose of attending his course of study or his training course or, as the case may be, the dwelling which he occupies when not attending his course, he shall be treated as occupying as his home the dwelling in respect of which he is liable to make payments.

(4) A full-time student shall not be treated as occupying a dwelling as his home for any week of absence from it, other than an absence occasioned by the need to enter hospital for treatment, outside the period of study, if the main purpose of his occupation during the period of study would be to facilitate attendance on his course.

(5) Where a claimant has been required to move into temporary accommodation by reason of essential repairs being carried out to the dwelling normally occupied as his home and he is liable to make payments (including payments of mortgage interest or, in Scotland, payments under heritable securities or, in either case, analogous payments) in respect of either (but not both) the dwelling normally occupied or the temporary accommodation, he shall be treated as occupying as his home the dwelling in respect of which he is liable to make those payments.

(6) Where a person is liable to make payments in respect of two (but not more than two) dwellings, he shall be treated as occupying both dwellings as his home only—

- (a) where he has left and remains absent from the former dwelling occupied as the home through fear of violence in that dwelling or of violence by a close relative or former partner

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and it is reasonable that housing costs should be met in respect of both his former dwelling and his present dwelling occupied as the home; or

- (b) in the case of partners, where one partner is a full-time student or is on a training course and it is unavoidable that he or they should occupy two separate dwellings and reasonable that housing costs should be met in respect of both dwellings; or
- (c) in the case where a person has moved into a new dwelling occupied as the home, except where sub-paragraph (5) applies, for a period not exceeding four benefit weeks [F361 from the first day of the benefit week where the move takes place on that day, but if it does not, from the first day of the next following benefit week] if his liability to make payments in respect of two dwellings is unavoidable.

(7) Where—

- (a) a person has moved into a dwelling and was liable to make payments in respect of that dwelling before moving in; and
- (b) he had claimed state pension credit before moving in and either that claim has not yet been determined or it has been determined but—
 - (i) an amount has not been included under this Schedule; or
 - (ii) the claim has been refused and a further claim has been made within four weeks of the date on which the claimant moved into the new dwelling occupied as the home; and
- (c) the delay in moving into the dwelling in respect of which there was liability to make payments before moving in was reasonable and—
 - (i) that delay was necessary in order to adapt the dwelling to meet the disablement needs of the claimant, his partner or a person under the age of [F362 20] for whom either the claimant or his partner is responsible; or
 - (ii) the move was delayed pending [F363 local welfare provision or] the outcome of an application under Part VIII of the 1992 Act for a social fund payment to meet a need arising out of the move or in connection with setting up the home in the dwelling; or
 - (iii) the person became liable to make payments in respect of the dwelling while he was a patient or was in a care home [F364 or an independent hospital],

he shall be treated as occupying the dwelling as his home for any period not exceeding four weeks immediately prior to the date on which he moved into the dwelling and in respect of which he was liable to make payments.

[F365(8) This sub-paragraph applies to a person who enters a care home or an independent hospital—

- (a) for the purpose of ascertaining whether that care home or independent hospital suits his needs, and
- (b) with the intention of returning to the dwelling which he normally occupies as his home should, in the event that, the care home or independent hospital prove not to suit his needs,

and while in the care home or independent hospital, the part of the dwelling which he normally occupies as his home is not let, or as the case may be, sub-let to another person.]

(9) A person to whom sub-paragraph (8) applies shall be treated as occupying the dwelling he normally occupies as his home during any period (commencing with the day he enters the [F366 care home or independent hospital]) not exceeding 13 weeks in which the person is resident in the [F366 care home or independent hospital], but only in so far as the total absence from the dwelling does not exceed 52 weeks.

(10) A person, other than a person to whom sub-paragraph (11) applies, shall be treated as occupying a dwelling as his home throughout any period of absence not exceeding 13 weeks, if, and only if—

- (a) he intends to return to occupy the dwelling as his home; and
- (b) the part of the dwelling normally occupied by him has not been let or, as the case may be, sub-let to another person; and
- (c) the period of absence is unlikely to exceed 13 weeks.

(11) This sub-paragraph applies to a person whose absence from the dwelling he normally occupies as his home is temporary and—

- (a) he intends to return to occupy the dwelling as his home; and
- (b) while the part of the dwelling which is normally occupied by him has not been let or, as the case may be, sub-let; and
- (c) he is—

[^{F367}(i) detained in custody on remand pending trial or, as a condition of bail, required to reside—

(aa) in a dwelling, other than the dwelling he occupies as his home; or

(bb) in premises approved under [^{F368}section 13 of the Offender Management Act 2007] ,

or, detained pending sentence upon conviction; or]

- (ii) resident in a hospital or similar institution as a patient; or
 - (iii) undergoing or, as the case may be, his partner or a person who has not attained the age of [^{F369}20] and who is dependent on him or his partner is undergoing, in the United Kingdom or elsewhere, medical treatment, or medically approved convalescence, in accommodation other than in a care home [^{F370}or an independent hospital]; or
 - (iv) following, in the United Kingdom or elsewhere, a training course; or
 - (v) undertaking medically approved care of a person residing in the United Kingdom or elsewhere; or
 - (vi) undertaking the care of a person under the age of [^{F371}20] whose parent or guardian is temporarily absent from the dwelling normally occupied by that parent or guardian for the purpose of receiving medically approved care or medical treatment; or
 - (vii) a person who is, whether in the United Kingdom or elsewhere, receiving medically approved care provided in accommodation other than a care home [^{F372}or an independent hospital]; or
 - (viii) a full-time student to whom sub-paragraph (3) or (6)(b) does not apply; or
 - (ix) a person, other than a person to whom sub-paragraph (8) applies, who is receiving care provided in a care home [^{F373}or an independent hospital]; or
 - (x) a person to whom sub-paragraph (6)(a) does not apply and who has left the dwelling he occupies as his home through fear of violence in that dwelling, or by a person who was formerly his partner or is a close relative; and
- (d) the period of his absence is unlikely to exceed a period of 52 weeks or, in exceptional circumstances, is unlikely substantially to exceed that period.

(12) A person to whom sub-paragraph (11) applies is to be treated as occupying the dwelling he normally occupies as his home during any period of absence not exceeding 52 weeks beginning with the first day of that absence.

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(13) In this paragraph—

- (a) “medically approved” means certified by a medical practitioner;
- (b) “training course” means such a course of training or instruction provided wholly or partly by or on behalf of or in pursuance of arrangements made with, or approved by or on behalf of, [^{F374}Skills Development Scotland,] Scottish Enterprise, Highlands and Islands Enterprise, a government department or the Secretary of State.

Textual Amendments

- F361** Words in Sch. II para. 4(6)(c) inserted (8.1.2007) by [The Social Security \(Miscellaneous Amendments\) \(No. 5\) Regulations 2006 \(S.I. 2006/3274\)](#), regs. 1, 4 (with reg. 4(2)(3))
- F362** Word in Sch. II para. 4(7)(c)(i) substituted (10.4.2006) by [The Social Security \(Young Persons\) Amendment Regulations 2006 \(S.I. 2006/718\)](#), regs. 1(2)(a), **6(4)(c)**
- F363** Words in Sch. II para. 4(7)(c)(ii) inserted (2.4.2013) by [The Social Security \(Miscellaneous Amendments\) Regulations 2013 \(S.I. 2013/443\)](#), regs. 1, **6(3)(a)**
- F364** Words in Sch. II para. 4(7)(c)(iii) inserted (24.10.2005) by [The Social Security \(Care Homes and Independent Hospitals\) Regulations 2005 \(S.I. 2005/2687\)](#), reg. 1, **Sch. 5 para. 5(a)(i)**
- F365** Sch. II para. 4(8) substituted (24.10.2005) by [The Social Security \(Care Homes and Independent Hospitals\) Regulations 2005 \(S.I. 2005/2687\)](#), reg. 1, **Sch. 5 para. 5(a)(ii)**
- F366** Words in Sch. II para. 4(9) substituted (24.10.2005) by [The Social Security \(Care Homes and Independent Hospitals\) Regulations 2005 \(S.I. 2005/2687\)](#), reg. 1, **Sch. 5 para. 5(a)(iii)**
- F367** Sch. II para. 4(11)(c)(i) substituted (4.4.2005) by [The Social Security \(Housing Benefit, Council Tax Benefit, State Pension Credit and Miscellaneous Amendments\) Regulations 2004 \(S.I. 2004/2327\)](#), regs. 1(1)(c), **7(5)(a)**
- F368** Words in Sch. II para. 4(11)(c)(i) (bb) substituted (17.11.2008) by [The Social Security \(Miscellaneous Amendments\) \(No.6\) Regulations 2008 \(S.I. 2008/2767\)](#), regs. 1(2), **5(4)(a)**
- F369** Word in Sch. II para. 4(11)(c)(iii) substituted (10.4.2006) by [The Social Security \(Young Persons\) Amendment Regulations 2006 \(S.I. 2006/718\)](#), regs. 1(2)(a), **6(4)(d)**
- F370** Words in Sch. II para. 4(11)(c)(iii) inserted (24.10.2005) by [The Social Security \(Care Homes and Independent Hospitals\) Regulations 2005 \(S.I. 2005/2687\)](#), reg. 1, **Sch. 5 para. 5(a)(iv)**
- F371** Word in Sch. II para. 4(11)(c)(vi) substituted (10.4.2006) by [The Social Security \(Young Persons\) Amendment Regulations 2006 \(S.I. 2006/718\)](#), regs. 1(2)(a), **6(4)(e)**
- F372** Words in Sch. II para. 4(11)(c)(vii) inserted (24.10.2005) by [The Social Security \(Care Homes and Independent Hospitals\) Regulations 2005 \(S.I. 2005/2687\)](#), reg. 1, **Sch. 5 para. 5(a)(iv)**
- F373** Words in Sch. II para. 4(11)(c)(ix) inserted (24.10.2005) by [The Social Security \(Care Homes and Independent Hospitals\) Regulations 2005 \(S.I. 2005/2687\)](#), reg. 1, **Sch. 5 para. 5(a)(iv)**
- F374** Words in Sch. II para. 4(13)(b) inserted (6.4.2009) by [The Social Security \(Miscellaneous Amendments\) Regulations 2009 \(S.I. 2009/583\)](#), regs. 1(2), **5(4)(a)**

Housing costs not met

5.—(1) No amount may be met under the provisions of this Schedule—

- (a) in respect of housing benefit expenditure; or
- (b) where the claimant is in accommodation which is a care home [^{F375}or an independent hospital] except where he is in such accommodation during a temporary absence from the dwelling he occupies as his home and in so far as they relate to temporary absences, the provisions of paragraph 4(8) to (12) apply to him during that absence.

[^{F376}(1A) In paragraph (1), “housing benefit expenditure” means expenditure in respect of which housing benefit is payable as specified in regulation 10(1) of the Housing Benefit (General)

Regulations 1987 but does not include any such expenditure in respect of which an additional amount is applicable under regulation 6(6)(c) (housing costs).]

- F377(2)
- F377(3)
- F377(4)
- F377(5)
- F377(6)
- F377(7)
- F377(8)
- F377(9)
- F377(10)
- F377(11)
- F377(12)
- F377(13)

Textual Amendments

- F375** Words in Sch. II para. 5(1)(b) inserted (24.10.2005) by [The Social Security \(Care Homes and Independent Hospitals\) Regulations 2005 \(S.I. 2005/2687\)](#), reg. 1, **Sch. 5 para. 5(b)**
- F376** Sch. II para. 5(1A) inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(1)(i)**
- F377** Sch. II para. 5(2)-(13) omitted (with effect in accordance with regs.19 - 21 of the amending S.I.) by virtue of [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(b)**

Apportionment of housing costs

- 6.—(1) Where the dwelling occupied as the home is a composite hereditament and—
 - (a) before 1st April 1990 for the purposes of section 48(5) of the General Rate Act 1967 (reduction of rates on dwellings), it appeared to a rating authority or it was determined in pursuance of subsection (6) of section 48 of that Act that the hereditament, including the dwelling occupied as the home, was a mixed hereditament and that only a proportion of the rateable value of the hereditament was attributable to use for the purpose of a private dwelling; or
 - (b) in Scotland, before 1st April 1989 an assessor acting pursuant to section 45(1) of the Water (Scotland) Act 1980 (provision as to valuation roll) has apportioned the net annual value of the premises including the dwelling occupied as the home between the part occupied as a dwelling and the remainder,

the additional amount applicable under this Schedule shall be such proportion of the amounts applicable in respect of the hereditament or premises as a whole as is equal to the proportion of the rateable value of the hereditament attributable to the part of the hereditament used for the purposes of a private tenancy or, in Scotland, the proportion of the net annual value of the premises apportioned to the part occupied as a dwelling house.

(2) Subject to sub-paragraph (1) and the following provisions of this paragraph, where the dwelling occupied as the home is a composite hereditament, the additional amount applicable under

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this Schedule shall be the relevant fraction of the amount which would otherwise be applicable under this Schedule in respect of the dwelling occupied as the home.

(3) For the purposes of sub-paragraph (2), the relevant fraction shall be obtained in accordance with the formula—

$$\frac{A}{A + B}$$

where—

“A” is the current market value of the claimant’s interest in that part of the composite hereditament which is domestic property within the meaning of section 66 of the Act of 1988;

“B” is the current market value of the claimant’s interest in that part of the composite hereditament which is not domestic property within that section.

(4) In this paragraph—

“composite hereditament” means—

- (a) as respects England and Wales, any hereditament which is shown as a composite hereditament in a local non-domestic rating list;
- (b) as respects Scotland, any lands and heritages entered in the valuation roll which are part residential subjects within the meaning of section 26(1) of the Act of 1987;

“local non-domestic rating list” means a list compiled and maintained under section 41(1) of the Act of 1988;

“the Act of 1987” means the Abolition of Domestic Rates Etc. (Scotland) Act 1987^{M38};

“the Act of 1988” means the Local Government Finance Act 1988^{M39}.

(5) Where responsibility for expenditure which relates to housing costs met under this Schedule is shared, the additional amounts applicable under this Schedule shall be calculated by reference to the appropriate proportion of that expenditure for which the claimant is responsible.

Modifications etc. (not altering text)

C6 Sch. II para. 6(3) formula maintained (coming into force in accordance with art. 1(2)(l) of the amending S.I.) by [The Social Security Benefits Up Rating Order 2017 \(S.I. 2017/260\)](#), arts. 1(2)(l), 25(1)(6), **Sch. 13**

Marginal Citations

M38 1987 c. 47.

M39 1988 c. 41.

The calculation for loans

^{F378}7.

Textual Amendments

F378 Sch. 2 paras. 7-12 omitted (6.4.2018) by virtue of [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(c)** (subject to transitional provisions in regs.19-21)

General provisions applying to housing costs

^{F378}8.

Textual Amendments

F378 Sch. 2 paras. 7-12 omitted (6.4.2018) by virtue of [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(c)** (subject to transitional provisions in regs.19-21)

Modifications etc. (not altering text)

C7 Sum in [Sch. II para. 8\(2\)](#) (as it continues to have effect in accordance with S.I. 2017/725 reg. 20) maintained (11.4.2022 with effect in accordance with art. 1(3)(m) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2022 \(S.I. 2022/292\)](#), **art. 30(4)**

The standard rate

^{F378}9.

Textual Amendments

F378 Sch. 2 paras. 7-12 omitted (6.4.2018) by virtue of [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(c)** (subject to transitional provisions in regs.19-21)

Excessive Housing Costs

^{F378}10.

Textual Amendments

F378 Sch. 2 paras. 7-12 omitted (6.4.2018) by virtue of [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(c)** (subject to transitional provisions in regs.19-21)

Loans on residential property

^{F378}11.

Textual Amendments

F378 Sch. 2 paras. 7-12 omitted (6.4.2018) by virtue of [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(c)** (subject to transitional provisions in regs.19-21)

Loans for repairs and improvements to the dwelling occupied as the home

^{F378}12.

Textual Amendments

F378 Sch. 2 paras. 7-12 omitted (6.4.2018) by virtue of [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(c)** (subject to transitional provisions in regs.19-21)

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the State Pension Credit Regulations 2002. (See end of Document for details)

[^{F379}Housing costs]

13.—(1) Subject to the deduction specified in sub-paragraph (2) and the reductions applicable in sub-paragraph (5), there shall be met under this paragraph the amounts, calculated on a weekly basis, in respect of the following housing costs—

- (a) payments by way of rent or ground rent relating to a long tenancy ^{F380} ...;
- (b) service charges;
- (c) payments by way of rentcharge within the meaning of section 1 of the Rentcharges Act 1977 ^{M40};
- (d) payments under a co-ownership scheme;
- (e) payments under or relating to a tenancy or licence of a Crown tenant;
- (f) where the dwelling occupied as the home is a tent, payments in respect of the tent and the site on which it stands.

(2) Subject to sub-paragraph (3), the deductions to be made from the weekly amounts to be met under this paragraph are—

- (a) where the costs are inclusive of any of the items mentioned in paragraph 5(2) of Schedule I to the Housing Benefit (General) Regulations 1987 ^{M41} (payment in respect of fuel charges), the deductions prescribed in that paragraph unless the claimant provides evidence on which the actual or approximate amount of the service charge for fuel may be estimated, in which case the estimated amount;
- (b) where the costs are inclusive of ineligible service charges within the meaning of paragraph 1 of Schedule I to the Housing Benefit (General) Regulations 1987 (ineligible service charges) the amounts attributable to those ineligible service charges or where that amount is not separated from or separately identified within the housing costs to be met under this paragraph, such part of the payments made in respect of those housing costs which are fairly attributable to the provision of those ineligible services having regard to the costs of comparable services;
- (c) any amount for repairs and improvements, and for this purpose the expression “repairs and improvements” has [^{F381}the meaning in sub-paragraph (7)].

(3) Where arrangements are made for the housing costs, which are met under this paragraph and which are normally paid for a period of 52 weeks, to be paid instead for a period of 53 weeks, or to be paid irregularly, or so that no such costs are payable or collected in certain periods, or so that the costs for different periods in the year are of different amounts, the weekly amount shall be the amount payable for the year divided by 52.

(4) Where the claimant or the claimant’s partner—

- (a) pays for reasonable repairs or redecorations to be carried out to the dwelling he occupies; and
- (b) that work was not the responsibility of the claimant or his partner; and
- (c) in consequence of that work being done, the costs which are normally met under this paragraph are waived,

then those costs shall, for a period not exceeding 8 weeks, be treated as payable.

(5) Where in England and Wales an amount calculated on a weekly basis in respect of housing costs specified in sub-paragraph (1)(e) (Crown tenants) includes water charges, that amount shall be reduced—

- (a) where the amount payable in respect of water charges is known, by that amount;

- (b) in any other case, by the amount which would be the likely weekly water charge had the property not been occupied by a Crown tenant.

[^{F382}(6) In this paragraph—

- (a) “co-ownership scheme” means a scheme under which a dwelling is let by a housing association and the tenant, or his personal representative, will, under the terms of the tenancy agreement or of the agreement under which he became a member of the association, be entitled, on his ceasing to be a member and subject to any condition stated in either agreement, to a sum calculated by reference directly or indirectly to the value of the dwelling;
- (b) “Crown tenant” means a person who occupies a dwelling under a tenancy or licence where the interest of the landlord belongs to Her Majesty in right of the Crown or to a government department or is held in trust for Her Majesty for the purposes of a government department except (in the case of an interest belonging to Her Majesty in right of the Crown) where the interest is under the management of the Crown Estate Commissioners [^{F383} or a relevant person] ;
- (c) “housing association” has the meaning assigned to it by section 1(1) of the Housing Associations Act 1985;
- (d) “long tenancy” means a tenancy granted for a term of years certain exceeding twenty one years, whether or not the tenancy is, or may become, terminable before the end of that term by notice given by or to the tenant or by re-entry, forfeiture (or, in Scotland, irritancy) or otherwise and includes a lease for a term fixed by law under a grant with a covenant or obligation for perpetual renewal unless it is a lease by sub-demise from one which is not a long tenancy][^{F384}, and]
- (e) [^{F384}“relevant person”, in relation to any property, rights or interests to which section 90B(5) of the Scotland Act 1998 applies, means the person who manages that property or those rights or interests.]

[^{F385}(7) For the purposes of sub-paragraph (2)(c), “repairs and improvements” means any of the following measures undertaken with a view to maintaining the fitness of the dwelling for human habitation or, where the dwelling forms part of a building, any part of a building containing that dwelling—

- (a) provision of a fixed bath, shower, wash basin, sink or lavatory, and necessary associated plumbing, including the provision of hot water not connected to a central heating system;
- (b) repairs to existing heating system;
- (c) damp proof measures;
- (d) provision of ventilation and natural lighting;
- (e) provision of drainage facilities;
- (f) provision of facilities for preparing and cooking food;
- (g) provision of insulation of the dwelling occupied as the home;
- (h) provision of electric lighting and sockets;
- (i) provision of storage facilities for fuel or refuse;
- (j) repairs of unsafe structural defects;
- (k) adapting a dwelling for the special needs of a disabled person; or
- (l) provision of separate sleeping accommodation for persons of different sexes aged 10 or over but under the age of 20 who live with the claimant and for whom the claimant or the claimant’s partner is responsible.]

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

Textual Amendments

- F379** Words in Sch. II para. 13 heading substituted (with effect in accordance with regs.19 - 21 of the amending S.I.) by [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(d)(i)**
- F380** Words in Sch. 02 para. 13(1)(a) omitted (2.10.2006) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2006 \(S.I. 2006/2378\)](#), **regs. 1(3)**, 14(5)(a)
- F381** Words in Sch. II para. 13(2)(c) substituted (with effect in accordance with regs.19 - 21 of the amending S.I.) by [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(d)(ii)**
- F382** Sch. II para. 13(6) added (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(1)(iii)**
- F383** Words in Sch. II para. 13(6)(b) inserted (1.4.2017) by [The Crown Estate Transfer Scheme 2017 \(S.I. 2017/524\)](#), art. 1(2), **Sch. 5 para. 94(a)**
- F384** Sch. II para. 13(6)(e) and word inserted (1.4.2017) by [The Crown Estate Transfer Scheme 2017 \(S.I. 2017/524\)](#), art. 1(2), **Sch. 5 para. 94(b)**
- F385** Sch. II para. 13(7) inserted (with effect in accordance with regs.19 - 21 of the amending S.I.) by [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(d)(iii)**

Marginal Citations

- M40** 1977 c. 30.
M41 S.I.1987/1971.

Persons residing with the claimant

14.—(1) Subject to the following provisions of this paragraph, the following deductions from the amount to be met under the preceding paragraphs of this Schedule in respect of housing costs shall be made—

- (a) in respect of a non-dependant aged 18 or over who is engaged in any remunerative work, [^{F386}£124.55];
- (b) in respect of a non-dependant aged 18 or over to whom paragraph (a) does not apply, [^{F387}£19.30].

(2) In the case of a non-dependant aged 18 or over to whom sub-paragraph [^{F388}(1)(a)] applies because he is in remunerative work, where the claimant satisfies the Secretary of State that the non-dependant's gross weekly income is—

- (a) less than [^{F389}£176.00] the deduction to be made under this paragraph shall be the deduction specified in sub-paragraph [^{F390}(1)(b)];
- (b) not less than [^{F391}£176.00] but less than [^{F392}£256.00], the deduction to be made under this paragraph shall be [^{F393}£44.40];
- (c) not less than [^{F394}£256.00] but less than [^{F395}£334.00], the deduction to be made under this paragraph shall be [^{F396}£60.95];
- (d) not less than [^{F397}£334.00] but less than [^{F398}£445.00], the deduction to be made under this paragraph shall be [^{F399}£99.65];
- (e) not less than [^{F400}£445.00] but less than [^{F401}£554.00], the deduction to be made under this paragraph shall be [^{F402}£113.50].

[^{F403}(2A) Where a non-dependant deduction is being made under the Loans for Mortgage Interest Regulations 2017, the amount of the deduction under sub-paragraph (1) or (2) is to be reduced by an amount equal to that non-dependant deduction.]

(3) Only one deduction shall be made under this paragraph in respect of partners and where, but for this sub-paragraph, the amount that would fall to be deducted in respect of one partner is higher than the amount (if any) that would fall to be deducted in respect of the other partner, the higher amount shall be deducted.

(4) In applying the provisions of sub-paragraph (2) in the case of partners, only one deduction shall be made in respect of the partners based on the partners' joint weekly income.

(5) Where a person is a non-dependant in respect of more than one joint occupier of a dwelling (except where the joint occupiers are partners), the deduction in respect of that non-dependant shall be apportioned between the joint occupiers (the amount so apportioned being rounded to the nearest penny) having regard to the number of joint occupiers and the proportion of the housing costs in respect of the dwelling occupied as the home payable by each of them.

(6) No deduction shall be made in respect of any non-dependants occupying the dwelling occupied as the home of the claimant, if the claimant or any partner of his is—

[^{F404}(a) certified as severely sight impaired or blind by a consultant ophthalmologist, or who is within 28 weeks of ceasing to be so certified; or]

(b) receiving in respect of himself either—

(i) an attendance allowance; ^{F405} ...

(ii) the care component of the disability living allowance [^{F406}, ^{F407} ...

(iii) the daily living component of personal independence payment] [^{F408}, ^{F409} ...

[the daily living component of adult disability payment; or]

^{F410}(iiiia)

(iv) armed forces independence payment.]

(7) No deduction shall be made in respect of a non-dependant—

(a) if, although he resides with the claimant, it appears to the Secretary of State that the dwelling occupied as his home is normally elsewhere; or

(b) if he is in receipt of a training allowance paid in connection with [^{F411}youth training] under section 2 of the Employment and Training Act 1973 ^{M42} or section 2 of the Enterprise and New Towns (Scotland) Act 1990^{M43}; or

(c) if he is a full-time student ^{F412} ...; or

^{F413}(cc)

(d) if he is aged under 25 and in receipt of income support or an income-based jobseeker's allowance; or

[^{F414}(dd) in respect of whom a deduction in the calculation of a rent rebate or allowance falls to be made under regulation 55 (non-dependant deductions) of the Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006; or]

(e) if he is not residing with the claimant because he has been [^{F415}an in-patient residing in a hospital or similar institution] for a period in excess of [^{F416}52] weeks, or is a prisoner; and in calculating any period of [^{F416}52] weeks, any 2 or more distinct periods separated by one or more intervals each not exceeding 28 days shall be treated as a single period; [^{F417}or]

[^{F418}(f) if he is in receipt of state pension credit.]

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- [^{F419}(g) if he is aged less than 25 and is in receipt of [^{F420}income-related] employment and support allowance which does not include an amount under section ^{F421}... 4(4) ^{F422}... of the Welfare Reform Act [^{F423}(component) or is not a member of the work-related activity group]]^{F424};
- or
- (h) if he is aged less than 25 and is entitled to an award of universal credit which is calculated on the basis that he does not have any earned income]
- (8) In the case of a non-dependant to whom sub-paragraph (1) applies because he is in remunerative work, there shall be disregarded from his gross income—
- [^{F425}(a) any attendance allowance, disability living allowance, armed forces independence payment, personal independence payment or adult disability payment received by him;]
- (b) any payment from the Macfarlane Trust, the Macfarlane (Special Payments) Trust, the Macfarlane (Special Payments) (No. 2) Trust (“the Trusts”), the Fund, the Eileen Trust [^{F426}, MFET Limited][^{F427}, the Skipton Fund, the Caxton Foundation][^{F428}, the Scottish Infected Blood Support Scheme][^{F429}, an approved blood scheme][^{F430}, the London Emergencies Trust, the We Love Manchester Emergency Fund][^{F431}, the National Emergencies Trust][^{F432}, the Victims of Overseas Terrorism Compensation Scheme] or the Independent Living [^{F433}Fund (2006)]; and
- [^{F434}(ba) any Grenfell Tower payment;]
- [^{F435}(bb) any child abuse payment;
- (bc) any Windrush payment;]
- [^{F436}(bd) any Post Office compensation payment;]
- (c) any payment in kind.
- [^{F437}(d) any payment made under or by a trust, established for the purpose of giving relief and assistance to disabled persons whose disabilities were caused by the fact that during their mother’s pregnancy she had taken a preparation containing the drug known as Thalidomide, and which is approved by the Secretary of State.]
- [^{F438}(9) For the purposes of sub-paragraph (7)(h), “earned income” has the meaning given in regulation 52 of the Universal Credit Regulations 2013.]

Textual Amendments

- F386** Sum in Sch. 2 para. 14(1)(a) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(a)**
- F387** Sum in Sch. 2 para. 14(1)(b) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(b)**
- F388** Word in Sch. 2 para. 14(2) substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 9(g)(i)**
- F389** Sum in Sch. 2 para. 14(2)(a) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(c)**
- F390** Words in Sch. 2 para. 14(2)(a) substituted (2.10.2006) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2006 \(S.I. 2006/2378\)](#), **regs. 1(3), 14(5)(b)(i)**

- F391** Sum in Sch. 2 para. 14(2)(b) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(d)(ii)**
- F392** Sum in Sch. 2 para. 14(2)(b) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(d)(iii)**
- F393** Sum in Sch. 2 para. 14(2)(b) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(d)(i)**
- F394** Sum in Sch. 2 para. 14(2)(c) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(e)(ii)**
- F395** Sum in Sch. 2 para. 14(2)(c) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(e)(iii)**
- F396** Sum in Sch. 2 para. 14(2)(c) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(e)(i)**
- F397** Sum in Sch. 2 para. 14(2)(d) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(f)(ii)**
- F398** Sum in Sch. 2 para. 14(2)(d) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(f)(iii)**
- F399** Sum in Sch. 2 para. 14(2)(d) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(f)(i)**
- F400** Sum in Sch. 2 para. 14(2)(e) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(g)(ii)**
- F401** Sum in Sch. 2 para. 14(2)(e) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(g)(iii)**
- F402** Sum in Sch. 2 para. 14(2)(e) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(4)(g)(i)**
- F403** Sch. 2 para. 14(2A) inserted (with effect in accordance with regs.19 - 21 of the amending S.I.) by [The Loans for Mortgage Interest Regulations 2017 \(S.I. 2017/725\)](#), reg. 1(2)(a), **Sch. 5 para. 4(e)**
- F404** Sch. 2 para. 14(6)(a) substituted (with effect in accordance with reg. 1(2) of the amending S.I.) by [The Universal Credit and Miscellaneous Amendments \(No.2\) Regulations 2014 \(S.I. 2014/2888\)](#), regs. 1(1), **3(4)(b)(ii)**
- F405** Word in Sch. 2 para. 14(6)(b)(i) omitted (8.4.2013) by virtue of [The Personal Independence Payment \(Supplementary Provisions and Consequential Amendments\) Regulations 2013 \(S.I. 2013/388\)](#), reg. 2, **Sch. para. 27(5)(b)(i)**
- F406** Sch. 2 para. 14(6)(b)(iii) and word inserted (8.4.2013) by [The Personal Independence Payment \(Supplementary Provisions and Consequential Amendments\) Regulations 2013 \(S.I. 2013/388\)](#), reg. 2, **Sch. para. 27(5)(b)(ii)**
- F407** Word in Sch. 2 para. 14(6)(b)(ii) omitted (8.4.2013) by virtue of [The Armed Forces and Reserve Forces Compensation Scheme \(Consequential Provisions: Subordinate Legislation\) Order 2013 \(S.I. 2013/591\)](#), art. 2(2), **Sch. para. 23(5)(b)**
- F408** Words in Sch. 2 para. 14(6)(b)(iv) inserted (8.4.2013) by [The Armed Forces and Reserve Forces Compensation Scheme \(Consequential Provisions: Subordinate Legislation\) Order 2013 \(S.I. 2013/591\)](#), art. 2(2), **Sch. para. 23(5)(c)**

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- F409** Word in Sch. 2 para. 14(6)(b)(iii) omitted (21.3.2022) by virtue of The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(4)(a)**
- F410** Sch. 2 para. 14(6)(b)(iiia) inserted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(4)(b)**
- F411** Words in Sch. 2 para. 14(7)(b) substituted (17.11.2008) by The Social Security (Miscellaneous Amendments) (No.6) Regulations 2008 (S.I. 2008/2767), regs. 1(2), **5(4)(c)**
- F412** Words in Sch. 2 para. 14(7)(c) omitted (6.12.2018) by virtue of The Social Security (Miscellaneous Amendments No. 5) Regulations 2017 (S.I. 2017/1187), regs. 1(2)(b), **5(2)(a)**
- F413** Sch. 2 para. 14(7)(cc) omitted (6.12.2018) by virtue of The Social Security (Miscellaneous Amendments No. 5) Regulations 2017 (S.I. 2017/1187), regs. 1(2)(b), **5(2)(b)**
- F414** Sch. 2 para. 14(7)(dd) inserted (2.10.2006) by The Social Security (Miscellaneous Amendments) (No. 4) Regulations 2006 (S.I. 2006/2378), **regs. 1(3), 14(5)(b)(ii)**
- F415** Words in Sch. 2 para. 14(7)(e) sum substituted (10.4.2006) by The Social Security (Hospital In-Patients) Regulations 2005 (S.I. 2005/3360), regs. 1(a), **8(4)(b)**
- F416** Word in Sch. 2 para. 14(7)(e) substituted (21.5.2003) by The Social Security (Hospital In-Patients and Miscellaneous Amendments) Regulations 2003 (S.I. 2003/1195), regs. 1(a), **8(2)**
- F417** Word in Sch. 2 para. 14(7)(e) inserted (4.4.2005) by The Social Security (Housing Benefit, Council Tax Benefit, State Pension Credit and Miscellaneous Amendments) Regulations 2004 (S.I. 2004/2327), regs. 1(1)(c), 7(5)(aa)**(b)(ii)**
- F418** Sch. 2 para. 14(7)(f) added (4.4.2005) by The Social Security (Housing Benefit, Council Tax Benefit, State Pension Credit and Miscellaneous Amendments) Regulations 2004 (S.I. 2004/2327), regs. 1(1)(c), **7(5)(b)(ii)(bb)**
- F419** Sch. 2 para. 14(7)(g) added (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(8)(e)**
- F420** Words in Sch. 2 para. 14(7)(g) inserted (2.4.2013) by The Social Security (Miscellaneous Amendments) Regulations 2013 (S.I. 2013/443), regs. 1, **6(3)(b)**
- F421** Words in Sch. 2 para. 14(7)(g) omitted by SI 2008/1554 reg. 4(8)(e) (as amended) (27.10.2008) by virtue of The Employment and Support Allowance (Miscellaneous Amendments) Regulations 2008 (S.I. 2008/2428), regs. 1(2), **41(4)**
- F422** Words in Sch. 2 para. 14(7)(g) omitted (3.4.2017) by virtue of The Employment and Support Allowance and Universal Credit (Miscellaneous Amendments and Transitional and Savings Provisions) Regulations 2017 (S.I. 2017/204), reg. 1, **Sch. 1 para. 5(3)(b)(i)** (with Sch. 2 paras. 1-7)
- F423** Words in Sch. 2 para. 14(7)(g) substituted (3.4.2017) by The Employment and Support Allowance and Universal Credit (Miscellaneous Amendments and Transitional and Savings Provisions) Regulations 2017 (S.I. 2017/204), reg. 1, **Sch. 1 para. 5(3)(b)(ii)** (with Sch. 2 paras. 1-7)
- F424** Sch. 2 para. 14(7)(h) and word inserted (29.4.2013) by The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013 (S.I. 2013/630), regs. 1(2), **33(6)(b)(i)**
- F425** Sch. 2 para. 14(8)(a) substituted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(4)(c)**
- F426** Words in Sch. 2 para. 14(8)(b) inserted (6.4.2010) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2010 (S.I. 2010/641), regs. 1(1), **6(3)(b)**
- F427** Words in Sch. 2 para. 14(8)(b) inserted (31.10.2011) by The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2011 (S.I. 2011/2425), regs. 1(2), **15(5)**
- F428** Words in Sch. 2 para. 14(8)(b) inserted (3.4.2017) by The Social Security (Scottish Infected Blood Support Scheme) Regulations 2017 (S.I. 2017/329), regs. 1, **5(3)(a)**
- F429** Words in Sch. 2 para. 14(8)(b) inserted (23.10.2017) by The Social Security (Infected Blood and Thalidomide) Regulations 2017 (S.I. 2017/870), regs. 1, **5(3)(a)**
- F430** Words in Sch. 2 para. 14(8)(b) inserted (19.6.2017) by The Social Security (Emergency Funds) (Amendment) Regulations 2017 (S.I. 2017/689), regs. 1, **4(3)(a)**
- F431** Words in Sch. 2 para. 14(8)(b) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(3)(a)**

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Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- F432** Words in Sch. II para. 14(8)(b) inserted (27.10.2023) by The Social Security (Habitual Residence and Past Presence, and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/1144), regs. 1(1), **5(3)(a)**
- F433** Words in Sch. 2 para. 14(8)(b) substituted (17.11.2008) by The Social Security (Miscellaneous Amendments) (No.6) Regulations 2008 (S.I. 2008/2767), regs. 1(2), **5(4)(d)**
- F434** Sch. 2 para. 14(8)(ba) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(3)(b)**
- F435** Sch. 2 para. 14(8)(bb)(bc) inserted (1.1.2022) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2021 (S.I. 2021/1405), regs. 1, **4(3)**
- F436** Sch. 2 para. 14(8)(bd) inserted (9.7.2023) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/640), regs. 1(1), **4(3)**
- F437** Sch. 2 para. 14(8)(d) inserted (23.10.2017) by The Social Security (Infected Blood and Thalidomide) Regulations 2017 (S.I. 2017/870), regs. 1, **5(4)**
- F438** Sch. 2 para. 14(9) inserted (29.4.2013) by The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013 (S.I. 2013/630), regs. 1(2), **33(6)(b)(ii)**

Marginal Citations

M42 1973 c. 50.

M43 1990 c. 35.

Rounding of fractions

15. Where any calculation made under this Schedule results in a fraction of a penny, that fraction shall be treated as a penny.

[^{F439}SCHEDULE IIA

Regulation 6(6)(d)

Additional amount applicable for claimants responsible for a child or qualifying young person

Textual Amendments

F439 Sch. 2A inserted (1.2.2019) by The State Pension Credit (Additional Amount for Child or Qualifying Young Person) (Amendment) Regulations 2018 (S.I. 2018/676), regs. 1, **2(4)**

General

1. This Schedule applies to a claimant who is responsible for a child or qualifying young person.
- 2.—(1) In this Schedule—
 - “child” means a person under the age of 16;
 - “qualifying young person” has the meaning given in regulation 4A.(2) Whether a claimant is responsible for a child or qualifying young person for the purposes of this Schedule is determined in accordance with paragraphs 3 to 8.

Child or qualifying young person normally living with the claimant

3.—(1) Subject to sub-paragraph (2), a claimant is responsible for a child or qualifying young person who normally lives with the claimant.

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*Changes to legislation: There are currently no known outstanding effects for the
The State Pension Credit Regulations 2002. (See end of Document for details)*

(2) A claimant is not responsible for a qualifying young person if the two of them are living as a couple.

(3) Where a child or qualifying young person normally lives with two or more persons who are not a couple, only one of them is to be treated as responsible, and that is the person who has the main responsibility for that child or qualifying young person.

(4) The persons referred to in sub-paragraph (3) may jointly nominate for the purposes of this Schedule which of them has the main responsibility for the child or qualifying young person, but the Secretary of State may determine that question—

- (a) if there is no joint nomination; or
- (b) if a nomination or change of nomination does not, in the opinion of the Secretary of State, reflect the arrangements between those persons.

Child or qualifying young person looked after by a local authority

4.—(1) Except where sub-paragraph (3) applies, a claimant is to be treated as not being responsible for a child or qualifying young person during any period when the child or qualifying young person is looked after by a local authority.

(2) A child or qualifying young person is treated as looked after by a local authority for the purposes of sub-paragraph (1) if that child or qualifying young person is looked after by a local authority within the meaning of section 22 of the Children Act 1989, section 17(6) of the Children (Scotland) Act 1995 or section 74 of the Social Services and Well-being (Wales) Act 2014.

(3) This sub-paragraph applies to any period—

- (a) which is in the nature of a planned short term break, or is one of a series of such breaks, for the purpose of providing respite for the person who normally cares for the child or qualifying young person; or
- (b) during which the child or qualifying young person is placed with, or continues to live with, their parent or a person who has parental responsibility for them.

(4) For the purposes of sub-paragraph (3), a person has parental responsibility if they are not a foster parent and—

- (a) in England and Wales, they have parental responsibility within the meaning of section 3 of the Children Act 1989, or
- (b) in Scotland, they have any or all of the legal responsibilities or rights described in sections 1 or 2 of the Children (Scotland) Act 1995.

Prisoners

5. The claimant is to be treated as not being responsible for a child or qualifying young person during any period when the child or qualifying young person is a prisoner.

Temporary absence in Great Britain

6. A claimant is to be treated as not being responsible for a child or qualifying young person during periods of temporary absence of the child or qualifying young person in Great Britain if the period of absence is likely to exceed 52 weeks, except where there are exceptional circumstances (for example, the child or qualifying young person is in hospital), and the absence is unlikely to be substantially more than 52 weeks.

Temporary absence outside Great Britain

7.—(1) A claimant is to be treated as not being responsible for a child or qualifying young person if the child or qualifying young person is temporarily absent from Great Britain for longer than—

- (a) 4 weeks, or where the absence is expected to exceed 4 weeks;
- (b) where sub-paragraph (2) applies—
 - (i) 8 weeks; or
 - (ii) where the absence is expected to exceed 8 weeks; or
- (c) where sub-paragraph (3) applies—
 - (i) 26 weeks; or
 - (ii) where the absence is expected to exceed 26 weeks.

(2) This sub-paragraph applies where the absence of the child or qualifying young person is in connection with the death of—

- (a) the claimant's partner or a child or qualifying young person normally living with the claimant; or
- (b) a close relative of—
 - (i) the claimant;
 - (ii) the claimant's partner; or
 - (iii) a child or qualifying young person normally living with the claimant,

and the Secretary of State considers that it would be unreasonable to expect the child or qualifying young person to return to Great Britain within 4 weeks.

(3) This sub-paragraph applies where the absence of the child or qualifying young person is solely in connection with—

- (a) the child or qualifying young person undergoing—
 - (i) treatment for an illness or physical or mental impairment by, or under the supervision of, a qualified practitioner; or
 - (ii) medically approved convalescence or care as a result of treatment for an illness or physical or mental impairment, where the child or qualifying young person had that illness or impairment before leaving Great Britain; or
- (b) the child or qualifying young person accompanying the claimant or the claimant's partner for convalescence or care as mentioned in sub-paragraph (a).

(4) In this paragraph—

“medically approved” means certified by a registered medical practitioner;

“qualified practitioner” means a person qualified to provide medical treatment, physiotherapy or a form of treatment which is similar to, or related to, either of those forms of treatment.

Death of child or qualifying young person

8.—(1) If a child or qualifying young person for whom a claimant is responsible dies, the claimant is to be treated as responsible for that child or qualifying young person until—

- (a) the end of the period of eight weeks starting with the day on which the child or qualifying young person dies; or
- (b) in the case of a qualifying young person, the date on which he or she would have attained the age of 20, if earlier.

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(2) The additional amount applicable to the claimant during the period in which they are treated as responsible for a child or qualifying young person under sub-paragraph (1) is to be calculated in accordance with paragraph 9 on the basis of the circumstances which existed on the day before the day on which the child or qualifying young person died.

Amount of additional payment

9.—(1) The additional amount applicable to a claimant to whom this Schedule applies is—

- (a) subject to paragraph 10, [^{F440}£66.29] for each child or qualifying young person; and
- (b) a further amount of—
 - (i) [^{F441}£35.93] where sub-paragraph (2) applies; or
 - (ii) [^{F442}£112.21] where sub-paragraph (3) applies.

(2) This sub-paragraph applies where the claimant is responsible for a child or qualifying young person who is entitled to a disability living allowance [^{F443}, child disability payment (within the meaning given in regulation 2 of the Disability Assistance for Children and Young People (Scotland) Regulations 2021)] [^{F444}, adult disability payment] or personal independence payment.

(3) This sub-paragraph applies where the claimant is responsible for a child or qualifying young person who is—

- (a) entitled to the care component of disability living allowance at the highest rate [^{F445}, the daily living component of adult disability payment at the enhanced rate] or the daily living component of personal independence payment at the enhanced rate; or
- [^{F446}(aa) entitled to the care component of child disability payment at the highest rate in accordance with regulation 11(5) of the Disability Assistance for Children and Young People (Scotland) Regulations 2021; or]
- (b) certified as severely sight impaired or blind by a consultant ophthalmologist.

Textual Amendments

- F440** Sum in Sch. 2A para. 9(1)(a) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by The Social Security Benefits Up-rating Order 2024 (S.I. 2024/242), arts. 1(3)(k), **29(5)(a)**
- F441** Sum in Sch. 2A para. 9(1)(b) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by The Social Security Benefits Up-rating Order 2024 (S.I. 2024/242), arts. 1(3)(k), **29(5)(b)(i)**
- F442** Sum in Sch. 2A para. 9(1)(b) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by The Social Security Benefits Up-rating Order 2024 (S.I. 2024/242), arts. 1(3)(k), **29(5)(b)(ii)**
- F443** Words in Sch. 2A para. 9(2) inserted (26.7.2021) by The Social Security (Scotland) Act 2018 (Disability Assistance for Children and Young People) (Consequential Modifications) Order 2021 (S.I. 2021/786), arts. 1(2), **10(2)(a)**
- F444** Words in Sch. 2A para. 9(2) inserted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(5)(a)**
- F445** Words in Sch. 2A para. 9(3)(a) inserted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(5)(b)**
- F446** Sch. 2A para. 9(3)(aa) inserted (26.7.2021) by The Social Security (Scotland) Act 2018 (Disability Assistance for Children and Young People) (Consequential Modifications) Order 2021 (S.I. 2021/786), arts. 1(2), **10(2)(b)**

Amount for the eldest child or qualifying young person born before 6th April 2017

10. In a case where the eldest child or qualifying young person for whom the claimant is responsible was born before 6th April 2017, the amount prescribed in paragraph 9(1)(a) in respect of that child or qualifying young person is [^{F447}£76.79]].

Textual Amendments

F447 Sum in [Sch. 2A para. 10](#) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(6)**

[^{F448}Schedule IIB

regulation 6(6)

Transitional Protection on Closure of Tax Credits

Textual Amendments

F448 [Sch. 2B](#) inserted (8.6.2024) by [The Social Security \(State Pension Age Claimants: Closure of Tax Credits\) \(Amendment\) Regulations 2024 \(S.I. 2024/611\)](#), regs. 1(1), **4(5)**

Interpretation

1. In this Schedule—

“HMRC” means His Majesty’s Revenue and Customs;

“indicative SPC amount” has the meaning given in paragraph 5;

“migration day” in relation to a claimant means the day before the day specified in paragraph (1) of article 3B (saving to cease following issue of tax credit closure notice) of the No. 32 Order;

“the No. 32 Order” means the Welfare Reform Act 2012 (Commencement No. 32 and Savings and Transitional Provisions) Order 2019;

“tax credit”, “child tax credit” and “working tax credit” have the same meaning as in the Tax Credits Act 2002.

Claimants eligible for protection

2.—(1) This Schedule applies where the claimant has been issued with a tax credit closure notice and—

(a) the claimant was entitled to an award of child tax credit on the migration day; and

(b) either—

(i) the claimant was entitled to an award of state pension credit when the tax credit closure notice was issued; or

(ii) the claimant made a claim for state pension credit on or after the issue of the tax credit closure notice and before the expiry of one month beginning with the deadline day specified in that notice.

(2) This Schedule does not apply where—

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- (a) the claimant was a member of a couple for the purposes of the child tax credit award when the tax credit closure notice was issued but is a single person or a member of a different couple for the purposes of state pension credit on the migration day; or
- (b) the claimant was a single person for the purposes of the child tax credit award when the tax credit closure notice was issued but is a member of a couple for the purposes of state pension credit on the migration day.

Transitional additional amount

3. An additional amount of the appropriate minimum guarantee (“the transitional additional amount”) applies in accordance with regulation 6(6)(e) if the weekly amount determined in accordance with paragraph 4 (representative weekly amount of child tax credit), combined with the weekly amount of state pension credit (if any) to which the claimant was entitled on the migration day, is greater than the weekly amount determined in accordance with paragraph 5 (indicative SPC amount).

Representative weekly amount of child tax credit

- 4.—(1) To calculate the representative weekly amount of an award of child tax credit—
- (a) take the figure for the daily rate of the award on the migration day provided by HMRC and calculated on the basis of the information as to the claimant’s circumstances held by HMRC on that day; and
 - (b) convert to a weekly figure by multiplying by 7.
- (2) For the purposes of sub-paragraph (1)(a) “the daily rate” is—
- (a) in a case where section 13(1) of the Tax Credit Act 2002 (relevant income does not exceed the income threshold or the claimant is entitled to a prescribed social security benefit) applies, the maximum rate of each element to which the claimant is entitled on the migration day divided by 365; and
 - (b) in any other case, the rate that would be produced by applying regulations 6 to 9 of the Tax Credits (Income Thresholds and Determination of Rates) Regulations 2002 as if the migration day were a relevant period of one day.

Indicative SPC amount

- 5.—(1) The indicative SPC amount is the weekly amount to which a claimant would be entitled if an award of state pension credit were calculated in accordance with the Act and these Regulations by reference to the claimant’s circumstances on the migration day—
- (a) disregarding any amount of working tax credit to which the person may be entitled on that day;
 - (b) including an additional amount in accordance with Schedule IIA (additional amount applicable for claimants responsible for a child or qualifying young person); and
 - (c) applying the assumptions in sub-paragraph (2).
- (2) The assumptions are—
- (a) the claimant is responsible for any child or qualifying young person in respect of whom the individual element of child tax credit is payable;
 - (b) the amount of the claimant’s earned income is the annual amount of any employment income or trading income, as defined by regulation 4 or 6 respectively of the Tax Credits (Definition and Calculation of Income) Regulations 2002, by reference to which the

representative weekly rate of that tax credit is calculated for the purposes of paragraph 4(1) converted to a net weekly amount by—

- (i) dividing by 52; and
- (ii) deducting such amount for income tax and national insurance contributions as the Secretary of State considers appropriate.

(3) If the claimant would not satisfy the condition in section 2(1) (guarantee credit) of the Act because the claimant has income which exceeds the appropriate minimum guarantee, the claimant is to be treated for the purposes of calculating the indicative SPC amount as if they were entitled to a guarantee credit of a nil amount.

Initial calculation of the transitional additional amount

6. The initial amount of the transitional additional amount is—
- (a) if the amount of the guarantee credit in the indicative SPC amount is greater than nil, the amount by which the representative weekly amount of child tax credit combined with the weekly amount of state pension credit (if any) to which the claimant was entitled on the migration day, exceeds the weekly amount of the indicative SPC amount;
 - (b) if the amount of the guarantee credit in the indicative SPC amount is nil—
 - (i) the sum of the representative weekly amount of child tax credit and the amount, if any, by which the income deducted in the calculation of the indicative SPC amount exceeds the amount of the appropriate minimum guarantee; minus
 - (ii) the amount of the maximum saving credit, but only if the indicative SPC amount includes a savings credit or would do but for the claimant's income being such that the condition in section 3(2)(b) of the Act is not met.

Reduction of the transitional additional amount

7.—(1) Whenever there is a relevant increase after the first day on which the transitional additional amount applies, the transitional additional amount is to be reduced by an amount equal to that increase.

(2) A relevant increase is an increase in the standard minimum guarantee or in any additional amount prescribed under section 2(3) of the Act, including where that additional amount is applied for the first time or reapplied following a change of circumstances.

Circumstances in which the transitional additional amount ceases

- 8.—(1) A transitional additional amount is no longer applicable if—
- (a) the transitional additional amount is reduced to nil in accordance with paragraph 7;
 - (b) the claimant was a member of a couple and ceases to be a member of that couple or becomes a member of a different couple;
 - (c) the claimant was single and becomes a member of a couple; or
 - (d) the claimant is no longer responsible for any child or qualifying young person for whom they were responsible at the time the tax credit closure notice was issued.

(2) Where the claimant ceases to be entitled to state pension credit, the transitional additional amount is not, subject to sub-paragraph (3), to apply to a subsequent award to the claimant or, if the claimant is a member of a couple, their partner.

(3) Where an award (“the subsequent award”) is made to a person who moves from Northern Ireland when they are entitled to an award of state pension credit that includes a transitional additional amount then, provided their circumstances are otherwise unchanged, the subsequent

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award is to include a transitional additional amount calculated as if the subsequent award were a continuation of the award made in Northern Ireland.

Effect of revision, appeal etc. of an award of a tax credit

9.—(1) Nothing in paragraph 4 or 5 requiring a calculation in relation to the transitional additional amount to be made on the basis of information held by HMRC on the migration day prevents the Secretary of State from revising or superseding a decision in relation to a claim for, or an award of, state pension credit where—

- (a) in the opinion of the Secretary of State, the information held on that day was inaccurate or incomplete in some material respect because of—
 - (i) a misrepresentation by a claimant;
 - (ii) a failure to report information that a claimant was required to report where that failure was advantageous to the claimant; or
 - (iii) an official error; or
 - (b) a decision has been made on or after the migration day on—
 - (i) an application made before the migration day to revise a decision in relation to an award of a tax credit (including the report of a change of circumstances); or
 - (ii) an appeal in relation to such an application.
- (2) In this paragraph “official error” means an error that—
- (a) was made by an officer of, or an employee of a body acting on behalf of, the Department for Work and Pensions or HMRC; and
 - (b) was not caused, or materially contributed to, by any person outside that body or outside the Department or HMRC,

but excludes any error of law which is shown to have been such by a subsequent decision of the Upper Tribunal or of a court as defined in section 27(7) of the Social Security Act 1998.]

SCHEDULE III

SPECIAL GROUPS

Polygamous marriages

1.—(1) The provisions of this paragraph apply in any case to which section 12 (polygamous marriages) applies if the claimant is taken to be “the person in question” for the purposes of that section.

(2) The following provision shall apply instead of section 3(1)—

“(1) The first condition is that, if the claimant is taken ^{F449}... to be “the person in question” for the purposes of section 12 (polygamous marriages),—

- (a) the case is one to which that section applies; and
- (b) any one or more of the persons falling within subsection (1)(c) of that section [^{F450}has attained pensionable age before 6 April 2016 and] has attained the age of 65 [^{F451}(before, on or after that date)].”.

(3) The following provision shall apply instead of section 4(1)—

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- “(1) A claimant is not entitled to state pension credit if, taking the claimant to be “the person in question” for the purposes of section 12 (polygamous marriages),—
- (a) the case is one to which that section applies; and
 - (b) any one or more of the other persons falling within subsection (1)(c) of that section is entitled to state pension credit.”.
- (4) The following provision shall apply instead of section 5—
- “5. Income and capital of claimant, spouses etc.
- (1) This section applies in any case to which section 12 (polygamous marriages) applies if the claimant is taken to be “the person in question” for the purposes of that section.
- (2) In any such case, the income and capital of each of the other persons falling within subsection (1)(c) of that section shall be treated for the purposes of this Act as income and capital of the claimant, except where regulations provide otherwise.”.
- (5) In regulation 6 (amount of the guarantee credit), for paragraph (1) there shall be substituted—
- “(1) Except as provided in the following provisions of these Regulations, in a case to which section 12 (polygamous marriages) applies if the claimant is taken to be “the person in question” for the purposes of that section the standard minimum guarantee is the sum of—
- (a) [^{F452}£332.95] per week in respect of the claimant and any one spouse of the claimant’s; and
 - (b) [^{F452}£114.80] per week in respect of for each additional spouse (whether of the claimant or that spouse) who falls within section 12 (1)(c).”.
- (6) The maximum savings credit shall be determined on the assumption that the standard minimum guarantee is the amount prescribed for partners under regulation 6(1)(a).
- (7) In regulation 7 (savings credit) for paragraph (2) there shall be substituted—
- “(2) In any case to which section 12 (polygamous marriages) [^{F453}applies,] if the claimant is taken to be “the person in question” for the purposes of that section, the amount prescribed for the savings credit threshold is [^{F454}£301.22].”.
- [^{F455}(7A) The following provision shall apply instead of regulation 7A (limitation of savings credit for certain mixed-age couples)—
- “7A.—(1) This regulation applies if, taking the claimant to be the person in question for the purposes of section 12 (polygamous marriages),—
- (a) the case is one to which that section applies; and
 - (b) at least one of the persons falling within subsection (1)(c) of that section had attained pensionable age before 6 April 2016 and at least one of those persons had not.
- (2) Where this regulation applies, the claimant is not entitled to a savings credit unless the claimant—
- (a) has been awarded a savings credit with effect from a day before 6 April 2016 and was entitled to a savings credit immediately before that date; and
 - (b) remained entitled to a savings credit at all times since the beginning of 6 April 2016.”.]

(8) In regulations [^{F456}3,]^{F457}...5, [^{F458}6(8),] 10,12 and 14 and in paragraph [^{F459}6(5)(b)(v)] of Schedule 1 and in Schedule 2, any reference to a partner includes also a reference to any additional spouse to whom this paragraph applies.

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(9) For the purposes of regulation 6(5)(a) and (b), paragraph 1(1)(b)(i) of Part I of Schedule I is satisfied only if both partners and each additional spouse to whom this paragraph applies are in receipt of attendance allowance [^{F460}, the care component of disability living allowance at the highest or middle rate prescribed in accordance with section 72(3) of the 1992 Act [^{F461}], the daily living component of personal independence payment at the standard or enhanced rate in accordance with section 78(3) of the 2012 Act]^{F462}, the daily living component of adult disability payment at the standard or enhanced rate in accordance with regulation 5 of the Disability Assistance for Working Age People (Scotland) Regulations 2022]^{F463} or armed forces independence payment].

(10) For the purposes of regulation 6(5)(a), paragraph 1(1)(c) of Part I of Schedule 1 is only satisfied if—

- (a) both partners and each additional spouse to whom this paragraph applies all fall within either paragraph 1(1)(c)(i) or paragraph 1(1)(c)(ii); and
- (b) at least one of them falls within paragraph 1(1)(c)(i); and
- (c) at least one of them falls within paragraph 1(1)(c)(ii) but not paragraph 1(1)(c)(i); and
- (d) either paragraph 1(1)(c)(iv) is satisfied or a person is entitled to and in receipt of an allowance under section 70 of the 1992 Act [^{F464} or carer support payment] in respect of caring for one or more, but not all, the persons who fall within paragraph 1(1)(c)(i).

(11) Any reference in this paragraph to an additional spouse to whom this paragraph applies is a reference to any person who is an additional spouse (whether of the claimant's or of a spouse of the claimant's) falling within subsection (1)(c) of section 12 if the claimant is taken to be "the person in question" for the purposes of that section.

Textual Amendments

- F449** Words in Sch. 3 para. 1(2) omitted (6.10.2003) by virtue of [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), 23(m)(i) (aa)
- F450** Words in Sch. 3 para. 1(2) inserted (21.12.2017) by [The Social Security \(Miscellaneous Amendments No. 5\) Regulations 2017 \(S.I. 2017/1187\)](#), regs. 1(2)(a), **5(3)(a)(i)**
- F451** Words in Sch. 3 para. 1(2) inserted (21.12.2017) by [The Social Security \(Miscellaneous Amendments No. 5\) Regulations 2017 \(S.I. 2017/1187\)](#), regs. 1(2)(a), **5(3)(a)(ii)**
- F452** Sums in Sch. 3 para. 1(5) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(7)(a)**
- F453** Word in Sch. 3 para. 1(7) inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 10(a)**
- F454** Sum in Sch. 3 para. 1(7) substituted (coming into force in accordance with art. 1(3)(k) of the amending S.I.) by [The Social Security Benefits Up-rating Order 2024 \(S.I. 2024/242\)](#), arts. 1(3)(k), **29(7)(b)**
- F455** Sch. 3 para. 1(7A) inserted (21.12.2017) by [The Social Security \(Miscellaneous Amendments No. 5\) Regulations 2017 \(S.I. 2017/1187\)](#), regs. 1(2)(a), **5(3)(b)**
- F456** Word in Sch. 3 para. 1(8) inserted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(8)** (with reg. 5(3))
- F457** Word in Sch. 3 para. 1(8) omitted (6.10.2008) by virtue of [The Social Security \(Miscellaneous Amendments\) \(No.4\) Regulations 2008 \(S.I. 2008/2424\)](#), regs. 1, **3(5)**
- F458** Words in Sch. 3 para. 1(8) inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), 23(m)(i)(bb)
- F459** Word in Sch. 3 para. 1(8) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(10)**
- F460** Words in Sch. 3 para. 1(9) substituted (8.4.2013) by [The Personal Independence Payment \(Supplementary Provisions and Consequential Amendments\) Regulations 2013 \(S.I. 2013/388\)](#), reg. 2, **Sch. para. 27(6)**

- F461** Sch. 3 para. 1(9): comma substituted for word (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(6)(a)**
- F462** Words in Sch. 3 para. 1(9) inserted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(6)(b)**
- F463** Words in Sch. 3 para. 1(9) inserted (8.4.2013) by The Armed Forces and Reserve Forces Compensation Scheme (Consequential Provisions: Subordinate Legislation) Order 2013 (S.I. 2013/591), art. 2(2), **Sch. para. 23(6)**
- F464** Words in Sch. 3 para. 1(10)(d) inserted (19.11.2023) by The Carer's Assistance (Carer Support Payment) (Scotland) Regulations 2023 (Consequential Amendments) Order 2023 (S.I. 2023/1218), arts. 1(2), **14(7)**

[^{F465}Persons serving a sentence of imprisonment detained in hospital]

[^{F466}2.—(1) [^{F467}Sub-paragraph (2) applies in the case of a claimant (“C”) who satisfies either of the following conditions.

(1A) The first condition is that—

- (a) C is being detained under section 45A or 47 of the Mental Health Act 1983 (power of higher courts to direct hospital admission; removal to hospital of persons serving sentences of imprisonment etc.); and
- (b) in any case where there is in relation to C a release date within the meaning of section 50(3) of that Act, C is being detained on or before the day which the Secretary of State certifies to be that release date.

(1B) The second condition is that C is being detained under—

- (a) section 59A of the Criminal Procedure (Scotland) Act 1995 (hospital direction); or
- (b) section 136 of the Mental Health (Care and Treatment) (Scotland) Act 2003 (transfer of prisoners for treatment of mental disorder).]

(2) In the case of a claimant to whom paragraph (1) applies—

- (a) section 2(3) has effect with the substitution of a reference to a nil amount for the reference to the standard minimum guarantee in paragraph (a)[^{F468}, and nil is the prescribed additional amount for the purposes of paragraph (b)]; and
- (b) the maximum amount of savings credit shall be taken to be nil.]

Textual Amendments

- F465** Sch. III para. 2 heading substituted (25.3.2010) by The Social Security (Persons Serving a Sentence of Imprisonment Detained in Hospital) Regulations 2010 (S.I. 2010/442), regs. 1, **4(3)(a)**
- F466** Sch. III para. 2 substituted (10.4.2006) by The Social Security (Hospital In-Patients) Regulations 2005 (S.I. 2005/3360), regs. 1(a), **8(5)**
- F467** Sch. III para. 2(1)-(1B) substituted for Sch. III para. 2(1) (25.3.2010) by The Social Security (Persons Serving a Sentence of Imprisonment Detained in Hospital) Regulations 2010 (S.I. 2010/442), regs. 1, **4(3)(b)**
- F468** Words in Sch. III para. 2(2)(a) added (10.4.2006) by The Social Security (Miscellaneous Amendments) Regulations 2006 (S.I. 2006/588), regs. 1(8), **4(4)**

Modifications etc. (not altering text)

- C8** Sch. III para. 2(2)(b) sum maintained (coming into force in accordance with art. 1(2)(l) of the amending S.I.) by The Social Security Benefits Up-rating Order 2017 (S.I. 2017/260), arts. 1(2)(l), 25(1)(6), **Sch. 13**

Status: Point in time view as at 08/06/2024.
Changes to legislation: There are currently no known outstanding effects for the
 The State Pension Credit Regulations 2002. (See end of Document for details)

[^{F469}SCHEDULE IIIA

Regulation 12

Date on which certain fixed length assessed income periods end

Textual Amendments

F469 Sch. 3A inserted (6.4.2016) by [The State Pension Credit \(Amendment\) Regulations 2015 \(S.I. 2015/1529\)](#), regs. 1, **2(4)**

Table

<i>Column 1</i>	<i>Column 2</i>
<i>Period in which the assessed income period would end apart from regulation 12(d)</i>	<i>Date on which assessed income period is to end</i>
1st April 2019 to 14th April 2019	14th July 2016
15th April 2019 to 30th April 2019	28th July 2016
1st May 2019 to 14th May 2019	14th August 2016
15th May 2019 to 31st May 2019	28th August 2016
1st June 2019 to 14th June 2019	14th October 2016
15th June 2019 to 30th June 2019	28th October 2016
1st July 2019 to 14th July 2019	14th November 2016
15th July 2019 to 31st July 2019	28th November 2016
1st August 2019 to 14th August 2019	14th December 2016
15th August 2019 to 31st August 2019	28th December 2016
1st September 2019 to 14th September 2019	14th February 2017
15th September 2019 to 30th September 2019	28th February 2017
1st October 2019 to 14th October 2019	14th March 2017
15th October 2019 to 31st October 2019	28th March 2017
1st November 2019 to 14th November 2019	14th April 2017
15th November 2019 to 30th November 2019	28th April 2017
1st December 2019 to 14th December 2019	14th June 2017
15th December 2019 to 31st December 2019	28th June 2017
1st January 2020 to 14th January 2020	14th July 2017
15th January 2020 to 31st January 2020	28th July 2017
1st February 2020 to 14th February 2020	14th September 2017
15th February 2020 to 29th February 2020	28th September 2017
1st March 2020 to 14th March 2020	14th October 2017

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

15th March 2020 to 31st March 2020	28th October 2017
1st April 2020 to 14th April 2020	14th December 2017
15th April 2020 to 30th April 2020	28th December 2017
1st May 2020 to 14th May 2020	14th January 2018
15th May 2020 to 31st May 2020	28th January 2018
1st June 2020 to 14th June 2020	14th March 2018
15th June 2020 to 30th June 2020	28th March 2018
1st July 2020 to 14th July 2020	14th April 2018
15th July 2020 to 31st July 2020	28th April 2018
1st August 2020 to 14th August 2020	14th June 2018
15th August 2020 to 31st August 2020	28th June 2018
1st September 2020 to 14th September 2020	14th July 2018
15th September 2020 to 30th September 2020	28th July 2018
1st October 2020 to 14th October 2020	14th August 2018
15th October 2020 to 31st October 2020	28th August 2018
1st November 2020 to 14th November 2020	14th October 2018
15th November 2020 to 30th November 2020	28th October 2018
1st December 2020 to 14th December 2020	14th November 2018
15th December 2020 to 31st December 2020	28th November 2018
1st January 2021 to 14th January 2021	14th January 2019
15th January 2021 to 31st January 2021	28th January 2019
1st February 2021 to 14th February 2021	14th February 2019
15th February 2021 to 28th February 2021	28th February 2019
1st March 2021 to 14th March 2021	14th March 2019
15th March 2021 to 5th April 2021	28th March 2019]

SCHEDULE IV

Regulation 17(7)

AMOUNTS TO BE DISREGARDED IN THE CALCULATION OF INCOME OTHER THAN EARNINGS

1. In addition to any sum which falls to be disregarded in accordance with paragraphs 3 to 6, £10 of any of the following, namely—

- (a) a war disablement pension (except insofar as such a pension falls to be disregarded under paragraph 2 or 3);
- (b) a war widow's or war widower's pension;

[^{F470}(ba) unless paragraph 1(a) or (b) applies, any payment described in regulation 15(5)(ac) (except insofar as such a payment falls to be disregarded under paragraph 2 or 3);]

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- (c) a pension payable to a person as a ^{F471}widow, widower or surviving civil partner] under ^{F472}... any power of Her Majesty otherwise than under an enactment to make provision about pensions for or in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown;
- ^{F473}(cc) a guaranteed income payment [^{F474}and, if the amount of that payment has been abated to less than £10 by a ^{F475}pension or payment falling within article 31(1)(a) or (b) of the Armed Forces and Reserve Forces (Compensation Scheme) Order 2005], so much of ^{F476}that pension or payment] as would not, in aggregate with the amount of ^{F477}any] guaranteed income payment disregarded, exceed £10];
- (d) a payment made to compensate for the non-payment of such a pension [^{F478}or payment] as is mentioned in any of the preceding sub-paragraphs;
- (e) a pension paid by the government of a country outside Great Britain which is analogous to any of the ^{F479}pensions or payments mentioned in sub-paragraphs (a) to (cc) above];
- ^{F480}(f) a pension paid by a government to victims of National Socialist persecution.]

Textual Amendments

- F470** Sch. IV para. 1(ba) inserted (5.1.2009) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(5)(a)**
- F471** Words in Sch. IV para. 1(c) substituted (5.12.2005) by [The Civil Partnership \(Pensions, Social Security and Child Support\) \(Consequential, etc. Provisions\) Order 2005 \(S.I. 2005/2877\)](#), art. 1, **Sch. 3 para. 35(4)(a)** (with art. 3)
- F472** Words in Sch. IV para. 1(c) omitted (5.1.2009) by virtue of [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(5)(b)**
- F473** Sch. IV para. 1(cc) inserted (4.4.2005) by [The Social Security \(Miscellaneous Amendments\) Regulations 2005 \(S.I. 2005/574\)](#), regs. 1(1), **2(7)(a)(8)(d)**
- F474** Words in Sch. IV para. 1(cc) inserted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(2), **4(5)(c)**
- F475** Words in Sch. IV para. 1(cc) substituted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2009 \(S.I. 2009/2655\)](#), regs. 1(2)(c), **5(5)(a)**
- F476** Words in Sch. IV para. 1(cc) substituted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2009 \(S.I. 2009/2655\)](#), regs. 1(2)(c), **5(5)(b)**
- F477** Word in Sch. IV para. 1(cc) substituted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2009 \(S.I. 2009/2655\)](#), regs. 1(2)(c), **5(5)(c)**
- F478** Words in Sch. IV para. 1(d) inserted (4.4.2005) by [The Social Security \(Miscellaneous Amendments\) Regulations 2005 \(S.I. 2005/574\)](#), regs. 1(1), **2(7)(b)(8)(d)**
- F479** Words in Sch. IV para. 1(e) substituted (4.4.2005) by [The Social Security \(Miscellaneous Amendments\) Regulations 2005 \(S.I. 2005/574\)](#), regs. 1(1), **2(7)(c)(8)(d)**
- F480** Sch. IV para. 1(f) substituted (20.3.2017) by [The Social Security \(Income-Related Benefits\) Amendment Regulations 2017 \(S.I. 2017/174\)](#), regs. 1, **4(3)**

2. The whole of any amount included in a pension to which paragraph 1 relates in respect of—
- the claimant's need for constant attendance;
 - the claimant's exceptionally severe disablement.

3. Any mobility supplement under [^{F481}article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006] (including such a supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983^{M44} or any payment intended to compensate for the non-payment of such a supplement.

Textual Amendments

F481 Words in Sch. IV para. 3 substituted (5.1.2009) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(5)(d)**

Marginal Citations

M44 [S.I. 1983/686](#); amended by [S.I. 1983/1164](#) and 1540 and 1986/628.

[^{F482}4. Any supplementary pension under article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006 (pensions to surviving spouses and surviving civil partners) and any analogous payment made by the Secretary of State for Defence to any person who is not a person entitled under that Order.]

Textual Amendments

F482 Sch. IV para. 4 substituted (5.1.2009) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(5)(e)**

5. In the case of a pension awarded at the supplementary rate under article 27(3) of the Personal Injuries (Civilians) Scheme 1983^{M45} (pensions to [^{F483}widows, widowers or surviving civil partners]), the sum specified in paragraph 1(c) of Schedule 4 to that Scheme.

Textual Amendments

F483 Words in Sch. IV para. 5 substituted (5.12.2005) by [The Civil Partnership \(Pensions, Social Security and Child Support\) \(Consequential, etc. Provisions\) Order 2005 \(S.I. 2005/2877\)](#), art. 1, **Sch. 3 para. 35(4)(c)** (with art. 3)

Marginal Citations

M45 [S.I.1983/686](#); the relevant amending Instruments are [S.I.1994/715](#) and 2021.

6.—(1) Any payment which is—

(a) made under any of the Dispensing Instruments to a [^{F484}widow, widower or surviving civil partner] of a person—

(i) whose death was attributable to service in a capacity analogous to service as a member of the armed forces of the Crown; and

(ii) whose service in such capacity terminated before 31st March 1973; and

[^{F485}(b) equal to the amount specified in article 23(2) of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006.]

(2) In this paragraph “the Dispensing Instruments” means the Order in Council of 19th December 1881, the Royal Warrant of 27th October 1884 and the Order by His Majesty of 14th January 1922 (exceptional grants of pay, non-effective pay and allowances).

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the State Pension Credit Regulations 2002. (See end of Document for details)

Textual Amendments

- F484** Words in Sch. IV para. 6(1)(a) substituted (5.12.2005) by [The Civil Partnership \(Pensions, Social Security and Child Support\) \(Consequential, etc. Provisions\) Order 2005 \(S.I. 2005/2877\)](#), art. 1, **Sch. 3 para. 35(4)(d)(i)** (with art. 3)
- F485** Sch. IV para. 6(1)(b) substituted (5.1.2009) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(5)(f)**

7. £10 of any widowed parent’s allowance to which the claimant is entitled under section 39A of the 1992 Act ^{M46}.

Marginal Citations

- M46** Section 39A was inserted by section 55 of the [Welfare Reform and Pensions Act 1999 \(c. 30\)](#).

[^{F486}7A. £10 of any widowed mother’s allowance to which the claimant is entitled under section 37 of the 1992 Act.]

Textual Amendments

- F486** Sch. IV para. 7A inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 11(a)**

8.—(1) Where the claimant occupies a dwelling as his home and he provides in that dwelling board and lodging accommodation, an amount, in respect of each person for whom such accommodation is provided for the whole or any part of a week, equal to—

- (a) where the aggregate of any payments made in respect of any one week in respect of such accommodation provided to such person does not exceed £20.00, 100% of such payments; or
- (b) where the aggregate of any such payments exceeds £20.00, £20.00 and 50% of the excess over £20.00.

^{F487}(2)

Textual Amendments

- F487** Sch. IV para. 8(2) omitted (3.10.2005) by virtue of [The Social Security \(Miscellaneous Amendments\) \(No. 2\) Regulations 2005 \(S.I. 2005/2465\)](#), regs. 1(2), **6(5)**

9. If the claimant—

- (a) owns the freehold or leasehold interest in any property or is a tenant of any property; and
- (b) occupies a part of that property; and
- (c) has an agreement with another person allowing that person to occupy another part of that property on payment of rent and—
 - (i) the amount paid by that person is less than £20 per week, the whole of that amount; or
 - (ii) the amount paid is £20 or more per week, £20.

10. Where a claimant receives income under an annuity purchased with a loan, which satisfies the following conditions—

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- (a) that the loan was made as part of a scheme under which not less than 90% of the proceeds of the loan were applied to the purchase by the person to whom it was made of an annuity ending with his life or with the life of the survivor of two or more persons (in this paragraph referred to as “the annuitants”) who include the person to whom the loan was made;
- (b) that at the time the loan was made the person to whom it was made or each of the annuitants had attained the age of 65 [^{F488}or, if it was higher at that time, pensionable age];
- (c) that the loan was secured on a dwelling in Great Britain and the person to whom the loan was made or one of the annuitants owns an estate or interest in that dwelling;
- (d) that the person to whom the loan was made or one of the annuitants occupies the dwelling on which it was secured as his home at the time the interest is paid; and
- (e) that the interest payable on the loan is paid by the person to whom the loan was made or by one of the annuitants,

the amount, calculated on a weekly basis, equal to—

- (i) where, or insofar as, section 369 of the Income and Corporation Taxes Act 1988 ^{M47} (mortgage interest payable under deduction of tax) applies to the payments of interest on the loan, the interest which is payable after deduction of a sum equal to income tax on such payments at the applicable percentage of income tax within the meaning of section 369(1A) of that Act;
- (ii) in any other case the interest which is payable on the loan without deduction of such a sum.

Textual Amendments

F488 Words in Sch. IV para. 10(b) inserted (6.12.2018) by The Social Security (Miscellaneous Amendments No. 5) Regulations 2017 (S.I. 2017/1187), regs. 1(2)(b), 5(4)

Marginal Citations

M47 1988 c. 1; subsection (1A) was inserted by the Finance Act 1994 (c. 9), section 81(3).

11.—(1) Any payment, other than a payment to which sub-paragraph (2) applies, made to the claimant by Trustees in exercise of a discretion exercisable by them.

(2) This sub-paragraph applies to payments made to the claimant by Trustees in exercise of a discretion exercisable by them for the purpose of—

- (a) obtaining food, ordinary clothing or footwear or household fuel;
- (b) the payment of rent, council tax or water charges for which that claimant or his partner is liable;
- (c) meeting housing costs of a kind specified in Schedule 2;

^{F489}(d)

(3) In a case to which sub-paragraph (2) applies, £20 or—

- (a) if the payment is less than £20, the whole payment; or
- (b) if, in the claimant’s case, £10 is disregarded in accordance with paragraph 1(a) to (f), [^{F490}or paragraph 7 [^{F491}or 7A]] £10 or the whole payment if it is less than £10.

(4) For the purposes of this paragraph—

“ordinary clothing and footwear” means clothing or footwear for normal daily use, but does not include school uniforms, or clothing and footwear used solely for sporting activities; and

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

“rent” means eligible rent for the purposes of the Housing Benefit (General) Regulations 1987^{M48} less any deductions in respect of non-dependants which fall to be made under regulation 63 (non-dependant deductions) of those Regulations.

Textual Amendments

- F489** Sch. IV para. 11(2)(d) omitted (6.10.2003) by virtue of [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(n)(i)**
- F490** Words in Sch. IV para. 11(3)(b) inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(n)(ii)**
- F491** Words in Sch. IV para. 11(3)(b) inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 11(b)**

Marginal Citations

- M48** [S.I. 1987/1971](#); see regulations 2(1) and 10.

12. Any increase in [^{F492}pension or allowance under Part 2 or 3 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006] paid in respect of a dependent other than the pensioner’s ^{F493}... [^{F494}partner].

Textual Amendments

- F492** Words in [Sch. IV para. 12](#) substituted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(2), **4(5)(g)(i)**
- F493** Words in [Sch. IV para. 12](#) omitted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by virtue of [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(2), **4(5)(g)(ii)**
- F494** Words in Sch. IV para. 12 inserted (5.12.2005) by [The Civil Partnership \(Pensions, Social Security and Child Support\) \(Consequential, etc. Provisions\) Order 2005 \(S.I. 2005/2877\)](#), art. 1, **Sch. 3 para. 35(4)(e)** (with art. 3)

13. Any payment ordered by a court to be made to the claimant or the claimant’s partner in consequence of any accident, injury or disease suffered by [^{F495}the person] to whom the payments are made.

Textual Amendments

- F495** Words in Sch. IV para. 13 substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 11(c)**

14. Periodic payments made to the claimant or the claimant’s partner under an agreement entered into in ^{F496}... settlement of a claim made by [^{F497}that person] for an injury suffered by him.

Textual Amendments

- F496** Word in Sch. IV para. 14 omitted (6.10.2003) by virtue of [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 11(d)(i)**

F497 Words in Sch. IV para. 14 substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), [Sch. para. 11\(d\)\(ii\)](#)

15. Any income which is payable outside the United Kingdom for such period during which there is a prohibition against the transfer to the United Kingdom of that income.

16. Any banking charges or commission payable in converting to Sterling payments of income made in a currency other than Sterling.

^{F498}**17.**

Textual Amendments

F498 Sch. IV para. 17 omitted (5.1.2009) by virtue of [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), [4\(5\)\(h\)](#)

[^{F499}**18.** Except in the case of income from capital specified in Part II of Schedule V, any actual income from capital.]

Textual Amendments

F499 Sch. IV paras. 17, 18 added (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, [2\(11\)\(f\)](#)

[^{F500}**19.** Any amount of carer support payment that is in excess of the amount the claimant would receive if they had an entitlement to carer's allowance under section 70 of the 1992 Act.]

Textual Amendments

F500 Sch. IV para. 19 inserted (19.11.2023) by [The Carer's Assistance \(Carer Support Payment\) \(Scotland\) Regulations 2023 \(Consequential Amendments\) Order 2023 \(S.I. 2023/1218\)](#), arts. 1(2), [14\(8\)](#)

SCHEDULE V

Regulation 17(8)

INCOME FROM CAPITAL

PART I

Capital disregarded for the purpose of calculating income

1. Any premises acquired for occupation by the claimant which he intends to occupy as his home within 26 weeks of the date of acquisition or such longer period as is reasonable in the circumstances to enable the claimant to obtain possession and commence occupation of the premises.

[^{F501}**1A.** The dwelling occupied by the claimant as his home but only one home shall be disregarded under this paragraph.]

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

Textual Amendments

F501 Sch. V para. 1A added (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(a)**

2. Any premises which the claimant intends to occupy as his home, and in respect of which he is taking steps to obtain possession and has sought legal advice, or has commenced legal proceedings, with a view to obtaining possession, for a period of 26 weeks from the date on which he first sought such advice or first commenced such proceedings whichever is the earlier, or such longer period as is reasonable in the circumstances to enable him to obtain possession and commence occupation of those premises.

3. Any premises which the claimant intends to occupy as his home to which essential repairs or alterations are required in order to render them fit for such occupation, for a period of 26 weeks from the date on which the claimant first takes steps to effect those repairs or alterations, or such longer period as is necessary to enable those repairs or alterations to be carried out.

4. Any premises occupied in whole or in part—

- (a) by a [^{F502}person who is a close relative, grandparent, grandchild, uncle, aunt, nephew or niece of the claimant or of his partner] as his home where that person [^{F503}has attained the qualifying age for state pension credit or is incapacitated];
- (b) by the former partner of the claimant as his home; but this provision shall not apply where the former partner is a person from whom the claimant is estranged or divorced [^{F504}or with whom he had formed a civil partnership that has been dissolved].

Textual Amendments

F502 Words in Sch. V para. 4(a) substituted (4.10.2004) by [The Social Security \(Housing Benefit, Council Tax Benefit, State Pension Credit and Miscellaneous Amendments\) Regulations 2004 \(S.I. 2004/2327\)](#), regs. 1(1)(a), **7(6)**

F503 Words in Sch. V para. 4(a) substituted (6.4.2010) by [The Social Security \(Equalisation of State Pension Age\) Regulations 2009 \(S.I. 2009/1488\)](#), regs. 1, **23(2)**

F504 Words in Sch. V para. 4(b) inserted (5.12.2005) by [The Civil Partnership \(Pensions, Social Security and Child Support\) \(Consequential, etc. Provisions\) Order 2005 \(S.I. 2005/2877\)](#), art. 1, **Sch. 3 para. 35(5)(a)** (with art. 3)

5. Any future interest in property of any kind, other than land or premises in respect of which the claimant has granted a subsisting lease or tenancy, including sub-leases or sub-tenancies.

6.—(1) Where a claimant has ceased to occupy what was formerly the dwelling occupied as the home following his estrangement or divorce [^{F505}, or dissolution of his civil partnership with,] from his former partner, that dwelling for a period of 26 weeks from the date on which he ceased to occupy that dwelling or, where the dwelling is occupied as the home by the former partner who is a lone parent, for so long as it is so occupied.

(2) In this paragraph—

- (a) “dwelling” includes any garage, garden and outbuildings, which were formerly occupied by the claimant as his home and any premises not so occupied which it is impracticable or unreasonable to sell separately, in particular, in Scotland, any croft land on which the dwelling is situated;
- (b) “lone parent” means a person who has no partner and who is responsible for, and a member of the same household as, a child; and

- (c) “child” means a person [^{F506}who is a qualifying young person [^{F507}within the meaning of regulation 4A] or] a child [^{F508}as defined in section 40 of the 2012 Act].

Textual Amendments

- F505** Words in Sch. V para. 6(1) inserted (5.12.2005) by [The Civil Partnership \(Pensions, Social Security and Child Support\) \(Consequential, etc. Provisions\) Order 2005 \(S.I. 2005/2877\)](#), art. 1, **Sch. 3 para. 35(5)(b)** (with art. 3)
- F506** Words in Sch. V para. 6(2)(c) substituted (10.4.2006) by [The Social Security \(Young Persons\) Amendment Regulations 2006 \(S.I. 2006/718\)](#), regs. 1(2)(a), **6(5)(a)**
- F507** Words in Sch. V para. 6(2)(c) inserted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(9)(a)** (with reg. 5(3))
- F508** Words in Sch. V para. 6(2)(c) substituted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(9)(a)** (with reg. 5(3))

7. Any premises where the claimant is taking reasonable steps to dispose of the whole of his interest in those premises, for a period of 26 weeks from the date on which he first took such steps, or such longer period as is reasonable in the circumstances to enable him to dispose of those premises.

8. All personal possessions.

9. The assets of any business owned in whole or in part by the claimant and for the purposes of which he is engaged as a self-employed earner or, if he has ceased to be engaged, for such period as may be reasonable in the circumstances to allow for disposal of those assets.

[^{F509}9A. The assets of any business owned in whole or in part by the claimant if—

- (a) he is not engaged as a self-employed earner in that business by reason of some disease or bodily or mental disablement; but
- (b) he intends to become engaged (or, as the case may be, re-engaged) as a self-employed earner in that business as soon as he recovers or is able to become engaged, or re-engaged, in that business,]

F510 ...

Textual Amendments

- F509** Sch. V para. 9A inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(o)(i)**
- F510** Words in Sch. V para. 9A omitted (6.10.2003) by virtue of [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(b)**

10. The surrender value of any policy of life insurance.

11. The value of any funeral plan contract; and for this purpose, “funeral plan contract” means a contract under which—

- (a) the claimant makes one or more payments to another person (“the provider”);
- (b) the provider undertakes to provide, or secure the provision of, a funeral in the United Kingdom for the claimant on his death; and
- (c) the sole purpose of the plan is to provide or secure the provision of a funeral for the claimant on his death.

12. Where an ex-gratia payment has been made by the Secretary of State on or after 1st February 2001 in consequence of the imprisonment or [^{F511}internment] of—

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- (a) the claimant;
- (b) the claimant's partner;
- (c) the claimant's deceased spouse [^{F512}or deceased civil partner]; or
- (d) the claimant's partner's deceased spouse [^{F512}or deceased civil partner],

by the Japanese during the Second World War, an amount equal to that payment.

Textual Amendments

F511 Word in Sch. V para. 12 substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 12(a)**

F512 Words in Sch. V para. 12(c)(d) inserted (5.12.2005) by [The Civil Partnership \(Pensions, Social Security and Child Support\) \(Consequential, etc. Provisions\) Order 2005 \(S.I. 2005/2877\)](#), art. 1, **Sch. 3 para. 35(5)(c)** (with art. 3)

13.—(1) Subject to sub-paragraph (2), the amount of any trust payment made to a claimant or a claimant's partner [^{F513}who is]—

- (a) ^{F514}... a diagnosed person;
- (b) [^{F515}a diagnosed person's partner or] was a diagnosed person's partner at the time of the diagnosed person's death;
- (c) ^{F516}... a parent of a diagnosed person, a person acting in place of the diagnosed person's parents or a person who was so acting at the date of the diagnosed person's death.

(2) Where [^{F517}a trust payment is made to]—

- (a) [^{F518}a person referred to in sub-paragraph (1)(a) or (b), that sub-paragraph] shall apply for the period beginning on the date on which the trust is made and ending on the date on which [^{F518}that person] dies;
- (b) [^{F519}a person referred to in sub-paragraph (1)(c), that sub-paragraph] shall apply for the period beginning on the date on which the trust payment is made and ending two years after that date.

(3) Subject to sub-paragraph (4), the amount of any payment by a person to whom a trust payment has been made or of any payment out of the estate of a person to whom a trust payment has been made, which is made to a claimant or a claimant's partner [^{F520}who is]—

- (a) ^{F521}... the diagnosed person;
- (b) [^{F522}a diagnosed person's partner or] was a diagnosed person's partner at the date of the diagnosed person's death; or
- (c) ^{F523}... a parent of a diagnosed person, a person acting in place of the diagnosed person's parents or a person who was so acting at the date of the diagnosed person's death.

(4) Where [^{F524}a payment referred to in sub-paragraph (3) is made to]—

- (a) [^{F525}a person referred to in sub-paragraph (3)(a) or (b), that sub-paragraph] shall apply for the period beginning on the date on which the payment is made and ending on the date on which [^{F525}that person] dies;
- (b) [^{F526}a person referred to in sub-paragraph (3)(c), that sub-paragraph] shall apply for the period beginning on the date on which the payment is made and ending two years after that date.

(5) In this paragraph, a reference to a person—

- (a) being the diagnosed person’s partner;
- (b) acting in place of the diagnosed person’s parents,

at the date of the diagnosed person’s death shall include a person who would have been such a person or a person who would have been so acting, but for the diagnosed person [^{F527}residing in a care home or an independent hospital] .

(6) In this paragraph—

“diagnosed person” means a person who has been diagnosed as suffering from, or who, after his death, has been diagnosed as having suffered from, variant [^{F528}Creutzfeldt]-Jakob disease;

“relevant trust” means a trust established out of funds provided by the Secretary of State in respect of persons who suffered, or who are suffering, from variant [^{F528}Creutzfeldt]-Jakob disease for the benefit of persons eligible for payments in accordance with its provisions;

“trust payment” means a payment under a relevant trust.

Textual Amendments

- F513** Words in Sch. V para. 13(1) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(i)**
- F514** Word in Sch. V para. 13(1)(a) omitted (6.10.2003) by virtue of [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(ii)**
- F515** Words in Sch. V para. 13(1)(b) inserted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(iii)**
- F516** Word in Sch. V para. 13(1)(c) omitted (6.10.2003) by virtue of [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(iv)**
- F517** Words in Sch. V para. 13(2) inserted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(v)**
- F518** Words in Sch. V para. 13(2)(a) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(vi)**
- F519** Words in Sch. V para. 13(2)(b) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(vii)**
- F520** Words in Sch. V para. 13(3) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(viii)**
- F521** Word in Sch. V para. 13(3)(a) omitted (6.10.2003) by virtue of [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(ix)**
- F522** Words in Sch. V para. 13(3)(b) inserted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(x)**
- F523** Word in Sch. V para. 13(3)(c) omitted (6.10.2003) by virtue of [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(xi)**
- F524** Words in Sch. V para. 13(4) inserted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(xii)**
- F525** Words in Sch. V para. 13(4)(a) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(xiii)**
- F526** Words in Sch. V para. 13(4)(b) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(xiv)**
- F527** Words in Sch. V para. 13(5) substituted (24.10.2005) by [The Social Security \(Care Homes and Independent Hospitals\) Regulations 2005 \(S.I. 2005/2687\)](#), reg. 1, **Sch. 5 para. 6**
- F528** Word in Sch. V para. 13(6) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(c)(xv)**

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14.—^{F529}(1) The amount of any payment, other than a war disablement pension or a war widow's or widower's pension, to compensate for the fact that the claimant, the claimant's partner, the claimant's deceased spouse ^{F530}or deceased civil partner] or the claimant's partner's deceased spouse ^{F530}or deceased civil partner]—

- (a) was a slave labourer or a forced labourer;
- (b) had suffered property loss or had suffered personal injury; or
- (c) was a parent of a child who had died,

during the Second World War.

^{F531}(2) In sub-paragraph (1), “war disablement pension” and “war widow's or widower's pension” include any payment described in regulation 15(5)(ac).]

Textual Amendments

F529 Sch. V para. 14(1): Sch. 5 para. 14 renumbered as Sch. 5 para. 14(1) (5.1.2009) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(6)(a)**

F530 Words in Sch. V para. 14 inserted (5.12.2005) by [The Civil Partnership \(Pensions, Social Security and Child Support\) \(Consequential, etc. Provisions\) Order 2005 \(S.I. 2005/2877\)](#), art. 1, **Sch. 3 para. 35(5)(d)** (with art. 3)

F531 Sch. V para. 14(2) inserted (5.1.2009) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(6)(a)**

15.—(1) Any payment made under ^{F532}or by] the Macfarlane Trust, the Macfarlane (Special Payments) Trust, the Macfarlane (Special Payments) (No. 2) Trust (“the Trusts”), the Fund, the Eileen Trust ^{F533}, MFET Limited], the ^{F534}Independent Living Fund (2006)], the Skipton Fund ^{F535}, the Caxton Foundation]]^{F536}, the Scottish Infected Blood Support Scheme]]^{F537}, an approved blood scheme]]^{F538}, the London Emergencies Trust, the We Love Manchester Emergency Fund]]^{F539}, the National Emergencies Trust]]^{F540}, the Victims of Overseas Terrorism Compensation Scheme] or the London Bombings Relief Charitable Fund.

^{F541}(1A) Any Grenfell Tower payment ^{F542}, child abuse payment, Windrush payment]]^{F543}, Post Office compensation payment or vaccine damage payment] or any payment made by the Child Migrants Trust (registered charity number 1171479) under the scheme for former British child migrants.]

(2) Any payment by or on behalf of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person, which derives from a payment made under ^{F532}or by] any of the Trusts to which sub-paragraph (1) refers ^{F544}, or from a Grenfell Tower payment ^{F545}, a child abuse payment ^{F546}, a Windrush payment, a Post Office compensation payment or a vaccine damage payment]] ,] and which is made to or for the benefit of that person's partner or former partner from whom he is not, or where that person has died was not, estranged or divorced ^{F547}or with whom he has formed a civil partnership that has not been dissolved or, where that person has died, had not been dissolved at the time of that person's death].

(3) Any payment by or on behalf of the partner or former partner of a person who is suffering or who suffered from haemophilia or who is or was a qualifying person provided that the partner or former partner and that person are not, or if either of them has died were not, estranged or divorced ^{F548}or, where the partner or former partner and that person have formed a civil partnership, the civil partnership has not been dissolved or, if either of them has died, had not been dissolved at the time of the death], which derives from a payment made under ^{F532}or by] any of the Trusts to which sub-paragraph (1) refers ^{F549}, or from a Grenfell Tower payment ^{F545}, a child abuse payment ^{F546},

a Windrush payment, a Post Office compensation payment or a vaccine damage payment]] ,] and which is made to or for the benefit of the person who is suffering from haemophilia or who is a qualifying person.

(4) Any payment by a person who is suffering from haemophilia or who is a qualifying person, which derives from a payment under [F532 or by] any of the Trusts to which sub-paragraph (1) refers, [F550 or from a Grenfell Tower payment [F545, a child abuse payment [F546, a Windrush payment, a Post Office compensation payment or a vaccine damage payment]] ,] where—

- (a) that person has no partner or former partner from whom he is not estranged or divorced [F551 or with whom he has formed a civil partnership that has not been dissolved], nor any child who is or had been a member of that person's household; and
- (b) the payment is made either—
 - (i) to that person's parent or step-parent, or
 - (ii) where that person at the date of the payment is a child or a student who has not completed his full-time education and has no parent or step-parent, to any person standing in the place of his parent,

but only for a period from the date of the payment until the end of two years from that person's death.

(5) Any payment out of the estate of a person who suffered from haemophilia or who was a qualifying person, which derives from a payment under [F532 or by] any of the Trusts to which sub-paragraph (1) refers, [F552 or from a Grenfell Tower payment [F545, a child abuse payment [F546, a Windrush payment, a Post Office compensation payment or a vaccine damage payment]] ,] where—

- (a) that person at the date of his death (the relevant date) had no partner or former partner from whom he was not estranged or divorced [F553 or with whom he had formed a civil partnership that had not been dissolved], nor any child who was or had been a member of his household; and
- (b) the payment is made either—
 - (i) to that person's parent or step-parent, or
 - (ii) where that person at the relevant date was a child or a student who had not completed his full-time education and had no parent or step-parent, to any person standing in place his parent,

but only for a period of two years from the relevant date.

[F554(5A) Any payment out of the estate of a person, which derives from a payment to meet the recommendation of the Infected Blood Inquiry in its interim report published on 29th July 2022 made under or by the Scottish Infected Blood Support Scheme or an approved blood scheme to the estate of the person, where the payment is made to the person's son, daughter, step-son or step-daughter.]

(6) In the case of a person to whom or for whose benefit a payment referred to in this paragraph is made, any capital resource which derives from any payment of income or capital made under or deriving from any of the Trusts [F555 or from a Grenfell Tower payment][F545, a child abuse payment][F546, a Windrush payment, a Post Office compensation payment or a vaccine damage payment].

(7) For the purposes of sub-paragraphs (2) to (6), any reference to the Trusts shall be construed as including a reference to the Fund [F556, the Eileen Trust [F557, MFET Limited][F558, the Skipton Fund][F559, the Caxton Foundation][F536, the Scottish Infected Blood Support Scheme][F560, an approved blood scheme][F561, the London Emergencies Trust, the We Love Manchester Emergency Fund][F562, the National Emergencies Trust][F563, the Victims of Overseas Terrorism Compensation Scheme] and the London Bombings Relief Charitable Fund].

(8) In this paragraph—

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“child” means any person [^{F564}who is a qualifying young person [^{F565}within the meaning of regulation 4A] or] a child [^{F566}as defined in section 40 of the 2012 Act] (child benefit);

“course of study” means any course of study, whether or not it is a sandwich course and whether or not a grant is made for undertaking or attending it;

“qualifying course” means a qualifying course as defined for the purposes of Parts II and IV of the Jobseeker’s Allowance Regulations;

“sandwich course” has the meaning given in regulation 5(2) of the Education (Student Support) Regulations 2001^{M49}, regulation 5(2) of the Education (Student Loans) (Scotland) Regulations 2000^{M50} or regulation 5(2) of the Education (Student Support) Regulations (Northern Ireland) 2000^{M51}, as the case may be;

“student” means a person, other than a person in receipt of a training allowance, who is attending or undertaking—

- (a) a course of study at an educational establishment; or
- (b) a qualifying course;

“training allowance” means an allowance (whether by way of periodical grants or otherwise) payable—

- (a) out of public funds by a Government department or by or on behalf of the Secretary of State, [^{F567}Skills Development Scotland,] Scottish Enterprise or Highlands and Islands Enterprise;
- (b) to a person for his maintenance or in respect of a member of his family; and
- (c) for the period, or part of the period, during which he is following a course of training or instruction provided by, or in pursuance of arrangements made with, that department or approved by that department in relation to him or so provided or approved by or on behalf of the Secretary of State, [^{F568}Skills Development Scotland,] Scottish Enterprise or Highlands and Islands Enterprise,

but it does not include an allowance paid by any Government department to or in respect of a person by reason of the fact that he is following a course of full-time education, other than under arrangements made under section 2 of the Employment and Training Act 1973^{M52} or is training as a teacher^{F569} ...

Textual Amendments

- F532** Words in Sch. 5 para. 15(1)-(5) inserted (6.4.2010) by [The Social Security \(Miscellaneous Amendments\) \(No. 2\) Regulations 2010 \(S.I. 2010/641\)](#), regs. 1(1), **6(7)**
- F533** Words in Sch. 5 para. 15(1) inserted (6.4.2010) by [The Social Security \(Miscellaneous Amendments\) \(No. 2\) Regulations 2010 \(S.I. 2010/641\)](#), regs. 1(1), **6(3)(c)**
- F534** Words in Sch. 5 para. 15(1) substituted (17.11.2008) by [The Social Security \(Miscellaneous Amendments\) \(No.6\) Regulations 2008 \(S.I. 2008/2767\)](#), regs. 1(2), **5(5)**
- F535** Words in Sch. 5 para. 15(1) inserted (31.10.2011) by [The Social Security \(Miscellaneous Amendments\) \(No. 3\) Regulations 2011 \(S.I. 2011/2425\)](#), regs. 1(2), **15(6)**
- F536** Words in Sch. 5 para. 15(1)(7) inserted (3.4.2017) by [The Social Security \(Scottish Infected Blood Support Scheme\) Regulations 2017 \(S.I. 2017/329\)](#), regs. 1, **5(3)(b)**
- F537** Words in Sch. 5 para. 15(1) inserted (23.10.2017) by [The Social Security \(Infected Blood and Thalidomide\) Regulations 2017 \(S.I. 2017/870\)](#), regs. 1, **5(3)(b)**
- F538** Words in Sch. 5 para. 15(1) inserted (19.6.2017) by [The Social Security \(Emergency Funds\) \(Amendment\) Regulations 2017 \(S.I. 2017/689\)](#), regs. 1, **4(3)(b)**
- F539** Words in Sch. 5 para. 15(1) inserted (15.7.2020) by [The Social Security \(Income and Capital\) \(Miscellaneous Amendments\) Regulations 2020 \(S.I. 2020/618\)](#), regs. 1, **4(4)(a)(i)**

- F540** Words in Sch. V para. 15(1) inserted (27.10.2023) by The Social Security (Habitual Residence and Past Presence, and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/1144), regs. 1(1), **5(3)(b)**
- F541** Sch. 5 para. 15(1A) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(4)(a)(ii)**
- F542** Words in Sch. 5 para. 15(1A) inserted (1.1.2022) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2021 (S.I. 2021/1405), regs. 1, **4(4)(a)**
- F543** Words in Sch. 5 para. 15(1A) inserted (9.7.2023) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/640), regs. 1(1), **4(4)(a)**
- F544** Words in Sch. 5 para. 15(2) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(4)(a)(iii)**
- F545** Words in Sch. 5 para. 15(2)-(6) inserted (1.1.2022) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2021 (S.I. 2021/1405), regs. 1, **4(4)(b)**
- F546** Words in Sch. 5 para. 15(2)-(6) substituted (9.7.2023) by The Social Security (Income and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/640), regs. 1(1), **4(4)(b)**
- F547** Words in Sch. 5 para. 15(2) inserted (5.12.2005) by The Civil Partnership (Pensions, Social Security and Child Support) (Consequential, etc. Provisions) Order 2005 (S.I. 2005/2877), art. 1, **Sch. 3 para. 35(5)(e)(i)** (with art. 3)
- F548** Words in Sch. 5 para. 15(3) inserted (5.12.2005) by The Civil Partnership (Pensions, Social Security and Child Support) (Consequential, etc. Provisions) Order 2005 (S.I. 2005/2877), art. 1, **Sch. 3 para. 35(5)(e)(ii)** (with art. 3)
- F549** Words in Sch. 5 para. 15(3) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(4)(a)(iii)**
- F550** Words in Sch. 5 para. 15(4) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(4)(a)(iv)**
- F551** Words in Sch. 5 para. 15(4)(a) inserted (5.12.2005) by The Civil Partnership (Pensions, Social Security and Child Support) (Consequential, etc. Provisions) Order 2005 (S.I. 2005/2877), art. 1, **Sch. 3 para. 35(5)(e)(iii)** (with art. 3)
- F552** Words in Sch. 5 para. 15(5) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(4)(a)(iv)**
- F553** Words in Sch. 5 para. 15(5)(a) inserted (5.12.2005) by The Civil Partnership (Pensions, Social Security and Child Support) (Consequential, etc. Provisions) Order 2005 (S.I. 2005/2877), art. 1, **Sch. 3 para. 35(5)(e)(iv)** (with art. 3)
- F554** Sch. 5 para. 15(5A) inserted (30.8.2023) by The Social Security (Infected Blood Capital Disregard) (Amendment) Regulations 2023 (S.I. 2023/894), regs. 1(1), **2(1)(c)(2)**
- F555** Words in Sch. 5 para. 15(6) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(4)(a)(v)**
- F556** Words in Sch. 5 para. 15(7) substituted (12.5.2004) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2004 (S.I. 2004/1141), regs. 1(1), **3(5)(6)(d)**
- F557** Words in Sch. 5 para. 15(7) inserted (6.4.2010) by The Social Security (Miscellaneous Amendments) (No. 2) Regulations 2010 (S.I. 2010/641), regs. 1(1), **6(3)(c)**
- F558** Words in Sch. 5 para. 15(7) substituted (12.12.2005) by The Income-related Benefits (Amendment) (No. 2) Regulations 2005 (S.I. 2005/3391), regs. 1, **7(3)(a)(ii)**
- F559** Words in Sch. 5 para. 15(7) inserted (31.10.2011) by The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2011 (S.I. 2011/2425), regs. 1(2), **15(6)**
- F560** Words in Sch. 5 para. 15(7) inserted (23.10.2017) by The Social Security (Infected Blood and Thalidomide) Regulations 2017 (S.I. 2017/870), regs. 1, **5(3)(b)**
- F561** Words in Sch. 5 para. 15(7) inserted (19.6.2017) by The Social Security (Emergency Funds) (Amendment) Regulations 2017 (S.I. 2017/689), regs. 1, **4(3)(b)**
- F562** Words in Sch. 5 para. 15(7) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(4)(a)(vi)**
- F563** Words in Sch. V para. 15(7) inserted (27.10.2023) by The Social Security (Habitual Residence and Past Presence, and Capital Disregards) (Amendment) Regulations 2023 (S.I. 2023/1144), regs. 1(1), **5(3)(b)**

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- F564** Words in Sch. 5 para. 15(8) substituted (10.4.2006) by [The Social Security \(Young Persons\) Amendment Regulations 2006 \(S.I. 2006/718\)](#), regs. 1(2)(a), **6(5)(b)**
- F565** Words in Sch. 5 para. 15(8) inserted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(9)(b)** (with reg. 5(3))
- F566** Words in Sch. 5 para. 15(8) substituted (28.7.2016) by [The Housing Benefit and State Pension Credit \(Temporary Absence\) \(Amendment\) Regulations 2016 \(S.I. 2016/624\)](#), regs. 1, **4(9)(b)** (with reg. 5(3))
- F567** Words in Sch. 5 para. 15(8)(a) inserted (6.4.2009) by [The Social Security \(Miscellaneous Amendments\) Regulations 2009 \(S.I. 2009/583\)](#), regs. 1(2), **5(4)(b)**
- F568** Words in Sch. 5 para. 15(8)(c) inserted (6.4.2009) by [The Social Security \(Miscellaneous Amendments\) Regulations 2009 \(S.I. 2009/583\)](#), regs. 1(2), **5(4)(b)**
- F569** Words in Sch. 5 para. 15(8) omitted (6.10.2003) by virtue of [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 12(b)**

Marginal Citations

- M49** [S.I.2000/951](#).
- M50** [S.S.I.2000/200](#).
- M51** [S.R.2000/213](#).
- M52** 1973 c. 50; section 2 was amended by section 25(1) of the [Employment Act 1988 \(c. 19\)](#), by Part I of Schedule 7 to the [Employment Act 1989 \(c. 38\)](#) and by section 47(1) of the [Trade Union Reform and Employment Rights Act 1993 \(c.19\)](#).

^{F570}**15A.**

Textual Amendments

- F570** Sch. V para. 15A omitted (12.12.2005) by virtue of [The Income-related Benefits \(Amendment\) \(No. 2\) Regulations 2005 \(S.I. 2005/3391\)](#), regs. 1, **7(3)(b)**

16.—^{F571}(1) An amount equal to the amount of any payment made in consequence of any personal injury to the claimant or, if the claimant has a partner, to the partner.

^{F572}(2) Where the whole or part of the payment is administered—

- ^{F573}(a) by the High Court or the County Court under Rule 21.11(1) of the Civil Procedure Rules 1998, or the Court of Protection, or on behalf of a person where the payment can only be disposed of by order or direction of any such court;
- (b) in accordance with an order made under ^{F574}... Rule 36.14 of the Ordinary Cause Rules 1993 or under Rule 128 of those Rules; or
- (c) in accordance with the terms of a trust established for the benefit of the claimant or his partner,

the whole of the amount so administered.]

Textual Amendments

- F571** Sch. V para. 16(1): Sch. 5 para. 16 renumbered as Sch. 5 para. 16(1) (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(o)(ii)**
- F572** Sch. V para. 16(2) inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(o)(ii)**

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The State Pension Credit Regulations 2002. (See end of Document for details)

F573 Words in Sch. 2 para. 16(2)(a) substituted (2.10.2006) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2006 \(S.I. 2006/2378\)](#), **regs. 1(3)**, 14(6)(a)

F574 Words in Sch. 2 para. 16(2)(b) omitted (2.10.2006) by [The Social Security \(Miscellaneous Amendments\) \(No. 4\) Regulations 2006 \(S.I. 2006/2378\)](#), **regs. 1(3)**, 14(6)(b)

17. Any amount specified in paragraphs 18 to 20 [^{F575}or 20B]—

- (a) in a case where there is an assessed income period, until the end of that period or until the expiration of one year from the date of payment, whichever is the later; or
- (b) in any other case, for a period of one year beginning with the date of receipt.

Textual Amendments

F575 Words in Sch. V para. 17 inserted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), **regs. 1(2)**, **4(6)(b)**

18. Amounts paid under a policy of insurance in connection with the loss of or damage to the property occupied by the claimant as his home and to his personal possessions.

19. So much of any amounts paid to the claimant or deposited in the claimant's name for the sole purpose of—

- (a) purchasing premises which the claimant intends to occupy as his home; or
- (b) effecting essential repairs or alterations to the premises occupied or intended to be occupied by the claimant as his home.

20.—(1) Any amount paid—

- (a) by way of arrears of benefit;
- (b) by way of compensation for the late payment of benefit; or
- (c) in lieu of the payment of benefit.
- [^{F576}(d) any payment made by a local authority (including in England a county council), or by the [^{F577}Welsh Ministers], to or on behalf of the claimant or his partner relating to a service which is provided to develop or sustain the capacity of the claimant or his partner to live independently in his accommodation][^{F578}; or
- (e) by way of local welfare provision including arrears and payments in lieu of local welfare provision; or
- (f) in consequence of a reduction of council tax under section 13, 13A or 80 of the Local Government Finance Act 1992 (reduction of liability of [^{F579}; council tax]);]
- [^{F580}(g) to rectify, or to compensate for, an error made by an officer of the Department for Work and Pensions which was not caused or materially contributed to by any person outside the Department and which prevented or delayed an assessment of the claimant's entitlement to contributory employment and support allowance.]

(2) In paragraph (1), “benefit” means—

- (a) attendance allowance under section 64 of the Contributions and Benefits Act;
- (b) disability living allowance;
- [^{F581}(ba) personal independence payment;]
- [^{F582}(bb) armed forces independence payment;]

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- (c) income support;
- (d) income-based jobseeker’s allowance;
- (e) housing benefit;
- (f) state pension credit;
- ^{F583}(g)
- ^{F584}(h) an increase of a disablement pension under section 104 of the Contributions and Benefits Act (increase where constant attendance needed), and any further increase of such a pension under section 105 of that Act (increase for exceptionally severe disablement);]
- (i) any amount included on account of the claimant’s exceptionally severe disablement [^{F585}or need for constant attendance,] in a war disablement pension or [^{F586}any other such amount described in regulation 15(5)(ac)].
- ^{F587}(j) council tax benefit;
- (k) social fund payments;
- (l) child benefit;
- ^{F588}(m)
- (n) child tax credit under the Tax Credits Act 2002.]
- ^{F589}(o) income-related employment and support allowance][^{F590};
- (p) universal credit]
- ^{F591}(q) bereavement support payment under section 30 of the Pensions Act 2014.]
- ^{F592}(r) early years assistance given in accordance with section 32 of the Social Security (Scotland) Act 2018.]
- ^{F593}(s) funeral expense assistance given in accordance with section 34 of the Social Security (Scotland) Act 2018.]
- ^{F594}(t) maternity allowance under section 35 of the 1992 Act (state maternity allowance for employed or self-employed earner).]
- ^{F595}(u) any Scottish child payment assistance given in accordance with section 79 of the Social Security (Scotland) Act 2018.]
- ^{F596}(v) any assistance given in accordance with the Carer’s Assistance (Young Carer Grants) (Scotland) Regulations 2019.]
- ^{F597}(w) short-term assistance given in accordance with regulations made under section 36 of the Social Security (Scotland) Act 2018;]
- ^{F598}(x) winter heating assistance given in accordance with regulations made under section 30 of the Social Security (Scotland) Act 2018;]
- ^{F599}(y) disability assistance given in accordance with regulations made under section 31 of the Social Security (Scotland) Act 2018.]

Textual Amendments

F576 Sch. V para. 20(1)(d) substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(d)**

F577 Words in Sch. V para. 20(1)(d) substituted (5.1.2009) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(6)(c)(i)**

F578 Sch. V para. 20(1)(e)(f) and word inserted (2.4.2013) by [The Social Security \(Miscellaneous Amendments\) Regulations 2013 \(S.I. 2013/443\)](#), regs. 1, **6(4)**

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the The State Pension Credit Regulations 2002. (See end of Document for details)

- F579** Words in Sch. V para. 20(1)(f) substituted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(4)(b)**
- F580** Sch. V para. 20(1)(g) inserted (15.7.2020) by The Social Security (Income and Capital) (Miscellaneous Amendments) Regulations 2020 (S.I. 2020/618), regs. 1, **4(4)(b)**
- F581** Sch. V para. 20(2)(ba) inserted (8.4.2013) by The Personal Independence Payment (Supplementary Provisions and Consequential Amendments) Regulations 2013 (S.I. 2013/388), reg. 2, **Sch. para. 27(7)**
- F582** Sch. V para. 20(2)(bb) inserted (8.4.2013) by The Armed Forces and Reserve Forces Compensation Scheme (Consequential Provisions: Subordinate Legislation) Order 2013 (S.I. 2013/591), art. 2(2), **Sch. para. 23(7)**
- F583** Sch. V para. 20(2)(g) omitted (6.10.2003) by virtue of The State Pension Credit (Transitional and Miscellaneous Provisions) Amendment Regulations 2003 (S.I. 2003/2274), regs. 1, **2(12)(e)(i)**
- F584** Sch. V para. 20(2)(h) substituted (6.10.2003) by The State Pension Credit (Transitional and Miscellaneous Provisions) Amendment Regulations 2003 (S.I. 2003/2274), regs. 1, **2(12)(e)(ii)**
- F585** Words in Sch. V para. 20(2)(i) inserted (6.10.2003) by The State Pension Credit (Transitional and Miscellaneous Provisions) Amendment Regulations 2003 (S.I. 2003/2274), regs. 1, **2(12)(e)(iii)**
- F586** Words in Sch. V para. 20(2)(i) substituted (5.1.2009) by The Social Security (Miscellaneous Amendments) (No. 7) Regulations 2008 (S.I. 2008/3157), regs. 1(1), **4(6)(c)(ii)**
- F587** Sch. V para 20(2)(j)-(n) added (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) Regulations 2002 (S.I. 2002/3019), regs. 1(2)(b), 23(o)(iii)(bb)
- F588** Sch. V para. 20(2)(m) omitted (6.10.2003) by virtue of The State Pension Credit (Transitional and Miscellaneous Provisions) Amendment Regulations 2003 (S.I. 2003/2274), regs. 1, **2(12)(e)(iv)**
- F589** Sch. V para. 20(2)(o) added (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(9)(a)**
- F590** Sch. V para. 20(2)(p) and semi-colon inserted (29.4.2013) by The Universal Credit (Consequential, Supplementary, Incidental and Miscellaneous Provisions) Regulations 2013 (S.I. 2013/630), regs. 1(2), **33(7)(a)**
- F591** Sch. V Pt. I para. 20(2)(q) inserted (coming into force in accordance with art. 1-3 of the amending S.I.) by The Pensions Act 2014 (Consequential, Supplementary and Incidental Amendments) Order 2017 (S.I. 2017/422), arts. 1(2), **21(3)(a)**
- F592** Sch. V para. 20(2)(r) inserted (coming into force in accordance with art. 1(2) of the amending S.I.) by The Social Security (Scotland) Act 2018 (Best Start Grants) (Consequential Modifications and Saving) Order 2018 (S.I. 2018/1138), **art. 7(3)**
- F593** Sch. V para. 20(2)(s) inserted (16.9.2019 immediately after S.S.I. 2019/292 comes into force) by The Social Security (Scotland) Act 2018 (Funeral Expense Assistance and Early Years Assistance) (Consequential Modifications and Savings) Order 2019 (S.I. 2019/1060), arts. 1(2)(b), **11(3)**
- F594** Sch. V para. 20(2)(t) inserted (31.10.2019) by The Social Security (Capital Disregards) (Amendment) Regulations 2019 (S.I. 2019/1314), regs. 1, **4(2)**
- F595** Sch. V para. 20(2)(u) inserted (coming into force in accordance with art. 1(2) of the amending S.I.) by The Social Security (Scotland) Act 2018 (Information-Sharing and Scottish Child Payment) (Consequential Provision and Modifications) Order 2020 (S.I. 2020/482), **art. 5(3)**
- F596** Sch. V para. 20(2)(v) inserted (9.11.2020) by The Social Security (Scotland) Act 2018 (Young Carer Grants, Short-Term Assistance and Winter Heating Assistance) (Consequential Provision and Modifications) Order 2020 (S.I. 2020/989), arts. 1(2), **4(3)**
- F597** Sch. V para. 20(2)(w) inserted (9.11.2020) by The Social Security (Scotland) Act 2018 (Young Carer Grants, Short-Term Assistance and Winter Heating Assistance) (Consequential Provision and Modifications) Order 2020 (S.I. 2020/989), arts. 1(2), **11(3)**
- F598** Sch. V para. 20(2)(x) inserted (9.11.2020) by The Social Security (Scotland) Act 2018 (Young Carer Grants, Short-Term Assistance and Winter Heating Assistance) (Consequential Provision and Modifications) Order 2020 (S.I. 2020/989), arts. 1(2), **17(3)**
- F599** Sch. V para. 20(y) inserted (26.7.2021) by The Social Security (Scotland) Act 2018 (Disability Assistance, Young Carer Grants, Short-term Assistance and Winter Heating Assistance) (Consequential Provision and Modifications) Order 2021 (S.I. 2021/886), arts. 1(2), **13(3)**

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Changes to legislation: There are currently no known outstanding effects for the State Pension Credit Regulations 2002. (See end of Document for details)

^{F600}20A.—(1) Subject to sub-paragraph (3), any payment of £5,000 or more to which paragraph 20(1)(a), (b) or (c) applies, which has been made to rectify, or to compensate for, an official error [^{F601}or an error on a point of law] relating to a [^{F602}relevant benefit, or to which paragraph 20(1)(g) applies, and which has been] received by the claimant in full on or after the day on which he became entitled to benefit under these Regulations.

- (2) Subject to sub-paragraph (3), the total amount of any payment disregarded under—
- (a) paragraph 7(2) of Schedule 10 to the Income Support (General) Regulations 1987;
 - (b) paragraph 12(2) of Schedule 8 to the Jobseeker’s Allowance Regulations 1996;
 - ^{F603}(c)
 - ^{F603}(d)
 - ^{F604}(e) paragraph 11(2) of Schedule 9 to the Employment and Support Allowance Regulations,]
 - ^{F605}(f) paragraph 9(2) [^{F606}or 9A] of Schedule 6 to the Housing Benefit Regulations 2006;
 - (g) paragraph 22 of Schedule 6 to the Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006;
 - (h) paragraph 9(2) of Schedule 5 to the Council Tax Benefit Regulations 2006; ^{F607}...
 - (i) paragraph 22 of Schedule 4 to the Council Tax Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006;][^{F608}or
 - (j) [^{F609}paragraph 18] of Schedule 10 to the Universal Credit Regulations 2013;]
 - ^{F610}(k) regulations 10A to 10C of the Universal Credit (Transitional Provisions) Regulations 2014;]

where the award during which the disregard last applied in respect of the relevant sum either terminated immediately before the relevant date or is still in existence at that date.

(3) Any disregard which applies under sub-paragraph (1) or (2) shall have effect until the award comes to an end.

- (4) In this paragraph—
- “the award”, except in sub-paragraph (2), means—
- (a) the award of State Pension Credit under these Regulations during which the relevant sum or, where it is received in more than one instalment, the first instalment of that sum is received; or
 - (b) where that award is followed immediately by one or more further awards which begins immediately after the previous award ends, such further awards until the end of the last award, provided that, for such further awards, the claimant—
 - (i) is the person who received the relevant sum;
 - (ii) is the partner of that person; or
 - (iii) was the partner of that person at the date of his death;

“official error”—

- (a) where the error relates to housing benefit^{F611}..., has the meaning given by regulation 1(2) of the Housing Benefit and Council Tax Benefit (Decisions and Appeals) Regulations 2001;

and

- (b) where the error relates to any other relevant benefit, has the meaning given by regulation 1(3) of the Social Security and Child Support (Decisions and Appeals) Regulations 1999;

“the relevant date” means the date on which the claimant became entitled to benefit under the Act;

“relevant benefit” means any benefit specified in paragraph 20(2); and

“the relevant sum” means the total payment referred to in sub-paragraph (1) or, as the case may be, the total amount referred to in sub-paragraph (2).]

Textual Amendments

- F600** Sch. V para. 20A substituted (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(12)(f)**
- F601** Words in Sch. V para. 20A(1) inserted (11.9.2018) by [The Social Security \(Treatment of Arrears of Benefit\) Regulations 2018 \(S.I. 2018/932\)](#), regs. 1, **4**
- F602** Words in Sch. V para. 20A(1) substituted (15.7.2020) by [The Social Security \(Income and Capital\) \(Miscellaneous Amendments\) Regulations 2020 \(S.I. 2020/618\)](#), regs. 1, **4(4)(c)(i)**
- F603** Sch. V para. 20A(2)(c)(d) omitted (5.1.2009) by virtue of [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(6)(d)**
- F604** Sch. V para. 20A(2)(e) and word added (27.10.2008) by [The Employment and Support Allowance \(Consequential Provisions\) \(No. 2\) Regulations 2008 \(S.I. 2008/1554\)](#), regs. 1(2)(b), **4(9)(b)(ii)**
- F605** Sch. V para. 20A(2)(f)-(i) inserted (5.1.2009) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(1), **4(6)(e)**
- F606** Words in Sch. V para. 20A(2)(f) inserted (15.7.2020) by [The Social Security \(Income and Capital\) \(Miscellaneous Amendments\) Regulations 2020 \(S.I. 2020/618\)](#), regs. 1, **4(4)(c)(ii)(aa)**
- F607** Sch. V para. 20A(2)(h) word omitted (29.4.2013) by [The Universal Credit \(Consequential, Supplementary, Incidental and Miscellaneous Provisions\) Regulations 2013 \(S.I. 2013/630\)](#), regs. 1(2), **33(7)(b)**
- F608** Sch. V para. 20A(2)(j) and word inserted (29.4.2013) by [The Universal Credit \(Consequential, Supplementary, Incidental and Miscellaneous Provisions\) Regulations 2013 \(S.I. 2013/630\)](#), regs. 1(2), **33(7)(b)**
- F609** Words in Sch. V Pt. I para. 20A(2)(j) substituted (29.10.2013) by [The Social Security \(Miscellaneous Amendments\) \(No. 3\) Regulations 2013 \(S.I. 2013/2536\)](#), regs. 1(1), **10(4)**
- F610** Sch. V para. 20A(2)(k) inserted (15.7.2020) by [The Social Security \(Income and Capital\) \(Miscellaneous Amendments\) Regulations 2020 \(S.I. 2020/618\)](#), regs. 1, **4(4)(c)(ii)(bb)**
- F611** Words in Sch. V para. 20A(4) revoked (1.4.2013) by [The Council Tax Benefit Abolition \(Consequential Provision\) Regulations 2013 \(S.I. 2013/458\)](#), reg. 1, **Sch. 1**

[^{F612}**20AA.** Any payment of a widowed parent’s allowance made pursuant to section 39A of the 1992 Act (widowed parent’s allowance)—

- (a) to the survivor of a cohabiting partnership (within the meaning in section 39A(7) of the 1992 Act) who is entitled to a widowed parent’s allowance for a period before the Bereavement Benefits (Remedial) Order 2023 comes into force, and
- (b) in respect of any period of time during the period ending with the day before the survivor makes the claim for a widowed parent’s allowance,

but only for a period of 52 weeks from the date of receipt of the payment.]

Textual Amendments

- F612** Sch. 5 para. 20AA inserted (9.2.2023) by [The Bereavement Benefits \(Remedial\) Order 2023 \(S.I. 2023/134\)](#), art. 1(2), **Sch. para. 5(a)** (with art. 2)

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[^{F613}**20B.** Any arrears of supplementary pension which is disregarded under paragraph 4 of Schedule 4 (amounts to be disregarded in the calculation of income other than earnings) or of any amount which is disregarded under paragraph 5 or 6 of that Schedule.]

Textual Amendments

F613 Sch. V para. 20B inserted (for specified purposes and with effect in accordance with reg. 1(2) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) \(No. 7\) Regulations 2008 \(S.I. 2008/3157\)](#), regs. 1(2), **4(6)(f)**

21. Where a capital asset is held in a currency other than sterling, any banking charge or commission payable in converting that capital into sterling.

22. The value of the right to receive income from an occupational pension scheme or a personal pension scheme.

23. The value of a right to receive income from a under a retirement annuity contract.

[^{F614}**23A.** Where a person elects to be entitled to a lump sum under Schedule 5 or 5A to the 1992 Act or under Schedule 1 to the Graduated Retirement Benefit Regulations, or is treated as having made such an election, and a payment has been made pursuant to that election, an amount equal to—

- (a) except where sub-paragraph (b) applies, the amount of any payment or payments made on account of that lump sum;
- (b) the amount of that lump sum,

but only for so long as that person does not change that election in favour of an increase of pension or benefit.]

Textual Amendments

F614 Sch. V para. 23A inserted (6.4.2006) by [The Social Security \(Deferral of Retirement Pensions, Shared Additional Pension and Graduated Retirement Benefit\) \(Miscellaneous Provisions\) Regulations 2005 \(S.I. 2005/2677\)](#), regs. 1(1), **13(4)**

[^{F615}**23AA.** Where a person chooses a lump sum under section 8(2) of the Pensions Act 2014 or in accordance with Regulations made under section 10 of that Act which include provision corresponding or similar to section 8(2) of that Act, or fails to make a choice, and a lump sum payment has been made, an amount equal to—

- (a) except where sub-paragraph (b) applies, the amount of any payment or payments made on account of that lump sum;
- (b) the amount of that lump sum,

but only for so long as that person does not alter that choice in favour of an increase of pension.]

Textual Amendments

F615 Sch. V para. 23AA inserted (coming into force in accordance with art. 1(2)(b) of the amending S.I.) by [The Pensions Act 2014 \(Consequential, Supplementary and Incidental Amendments\) Order 2015 \(S.I. 2015/1985\)](#), arts. 1(2)(b), **24(3)**

[^{F616}**23B.** Any payment made under Part 8A of the 1992 Act (entitlement to health in pregnancy grant).]

Textual Amendments

F616 Sch. V para. 23B inserted (for specified purposes and with effect in accordance with reg. 1(4) of the amending S.I.) by [The Social Security \(Miscellaneous Amendments\) Regulations 2009 \(S.I. 2009/583\)](#), [reg. 5\(5\)](#)

[^{F617}**23C.** Any payments made ^{F618}...—

(a) [^{F619}by virtue of regulations made under] section 57 (direct payments) of the Health and Social Care Act 2001;

[^{F620}(b) as a direct payment as defined in section 4(2) of the Social Care (Self-directed Support) (Scotland) Act 2013; ^{F621}...]

(c) [^{F622}by virtue of regulations made under] sections 12A to 12C (direct payments for health care) of the National Health Service Act 2006;]^{F623}...

[^{F624}(d) under sections 31 to 33 of the Care Act 2014]^{F625}(direct payments); or]]

[^{F625}(e) by virtue of regulations made under section 50 or 52 of the Social Services and Well-being (Wales) Act 2014 (direct payments).]

Textual Amendments

F617 Sch. V para. 23C inserted (31.10.2011) by [The Social Security \(Miscellaneous Amendments\) \(No. 3\) Regulations 2011 \(S.I. 2011/2425\)](#), regs. 1(2), **15(7)**

F618 Words in Sch. V Pt. I para. 23C omitted (1.4.2014) by virtue of [The Social Care \(Self-directed Support\) \(Scotland\) Act 2013 \(Consequential Modifications and Savings\) Order 2014 \(S.I. 2014/513\)](#), art. 1(2), **Sch. para. 7(a)** (with art. 3)

F619 Words in Sch. V Pt. I para. 23C(a) inserted (1.4.2014) by [The Social Care \(Self-directed Support\) \(Scotland\) Act 2013 \(Consequential Modifications and Savings\) Order 2014 \(S.I. 2014/513\)](#), art. 1(2), **Sch. para. 7(b)** (with art. 3)

F620 Sch. V Pt. I para. 23C(b) substituted (1.4.2014) by [The Social Care \(Self-directed Support\) \(Scotland\) Act 2013 \(Consequential Modifications and Savings\) Order 2014 \(S.I. 2014/513\)](#), art. 1(2), **Sch. para. 7(c)** (with art. 3)

F621 Word in Sch. V para. 23C(b) omitted (1.4.2015) by virtue of [The Care Act 2014 \(Consequential Amendments\) \(Secondary Legislation\) Order 2015 \(S.I. 2015/643\)](#), art. 1(2), **Sch. para. 19(3)(a)** (with art. 4)

F622 Words in Sch. V Pt. I para. 23C(c) inserted (1.4.2014) by [The Social Care \(Self-directed Support\) \(Scotland\) Act 2013 \(Consequential Modifications and Savings\) Order 2014 \(S.I. 2014/513\)](#), art. 1(2), **Sch. para. 7(b)** (with art. 3)

F623 Word in Sch. V Pt. I para. 23C(c) omitted (3.11.2017) by virtue of [The Social Services and Well-being \(Wales\) Act 2014 and the Regulation and Inspection of Social Care \(Wales\) Act 2016 \(Consequential Amendments\) Order 2017 \(S.I. 2017/901\)](#), arts. 1, **9(3)(a)**

F624 Sch. V para. 23C(d) and word inserted (1.4.2015) by [The Care Act 2014 \(Consequential Amendments\) \(Secondary Legislation\) Order 2015 \(S.I. 2015/643\)](#), art. 1(2), **Sch. para. 19(3)(b)** (with art. 4)

F625 Sch. V Pt. I para. 23C(e) and words inserted (3.11.2017) by [The Social Services and Well-being \(Wales\) Act 2014 and the Regulation and Inspection of Social Care \(Wales\) Act 2016 \(Consequential Amendments\) Order 2017 \(S.I. 2017/901\)](#), arts. 1, **9(3)(b)**

[^{F626}**23D.**—(1) Any payment made by a local authority in accordance with section 26A of the Children (Scotland) Act 1995.

Status: Point in time view as at 08/06/2024.

Changes to legislation: There are currently no known outstanding effects for the State Pension Credit Regulations 2002. (See end of Document for details)

(2) Subject to sub-paragraph (3), any payment or part of a payment made by a local authority in accordance with section 26A of the Children (Scotland) Act 1995 to a person (“A”) which A passes on to the claimant.

- (3) Sub-paragraph (2) only applies where A—
- (a) was formerly in the claimant’s care;
 - (b) is aged 16 or over; and
 - (c) continues to live with the claimant.]

Textual Amendments

F626 Sch. V Pt. I para. 23D inserted (5.8.2016) by [The Children and Young People \(Scotland\) Act 2014 \(Consequential Modifications\) Order 2016 \(S.I. 2016/732\)](#), arts. 1(1), **4(3)**

[^{F627}**23E.**—[

^{F628}(1)] A payment of bereavement support payment in respect of the rate set out in regulation 3(2) or (5) of the Bereavement Support Payment Regulations 2017 (rate of bereavement support payment), but only for a period of 52 weeks from the date of receipt of the payment.

[

^{F629}(2) Where bereavement support payment under section 30 of the Pensions Act 2014 is paid to the survivor of a cohabiting partnership (within the meaning in section 30(6B) of the Pensions Act 2014) in respect of a death occurring before the day the Bereavement Benefits (Remedial) Order 2023 comes into force, any amount of that payment which is—

- (a) in respect of the rate set out in regulation 3(1) of the Bereavement Support Payment Regulations 2017, and
- (b) paid as a lump sum for more than one monthly recurrence of the day of the month on which their cohabiting partner died,

but only for a period of 52 weeks from the date of receipt of the payment.]]

Textual Amendments

F627 Sch. 5 para. 23E inserted (coming into force in accordance with art. 1-3 of the amending S.I.) by [The Pensions Act 2014 \(Consequential, Supplementary and Incidental Amendments\) Order 2017 \(S.I. 2017/422\)](#), arts. 1(2), **21(3)(b)**

F628 Sch. 5 para. 23E renumbered as Sch. 5 para. 23E(1) (9.2.2023) by [The Bereavement Benefits \(Remedial\) Order 2023 \(S.I. 2023/134\)](#), art. 1(2), **Sch. para. 5(b)(i)** (with art. 2)

F629 Sch. 5 para. 23E(2) inserted (9.2.2023) by [The Bereavement Benefits \(Remedial\) Order 2023 \(S.I. 2023/134\)](#), art. 1(2), **Sch. para. 5(b)(ii)** (with art. 2)

[^{F630}**23F.** Any payment made under or by a trust, established for the purpose of giving relief and assistance to disabled persons whose disabilities were caused by the fact that during their mother’s pregnancy she had taken a preparation containing the drug known as Thalidomide, and which is approved by the Secretary of State.]

Textual Amendments

F630 Sch. V Pt. I para. 23F added (23.10.2017) by [The Social Security \(Infected Blood and Thalidomide\) Regulations 2017 \(S.I. 2017/870\)](#), regs. 1, **5(5)**

PART II

[^{F631}Capital disregarded only for the purposes of determining deemed income]

Textual Amendments

F631 Sch. V Pt. II heading substituted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) Regulations 2002 \(S.I. 2002/3019\)](#), regs. 1(2)(b), **23(o)(iv)**

24. The value of the right to receive any income under a life interest or from a life rent.

25. The value of the right to receive any rent except where the claimant has a reversionary interest in the property in respect of which rent is due.

26. The value of the right to receive any income under an annuity or the surrender value (if any) of such an annuity.

27. The dwelling together with any garage, garden and outbuildings, normally occupied by the claimant as his home, including any premises not so occupied which it is impracticable or unreasonable to sell separately and in particular, in Scotland, any croft land on which the dwelling is situated; but only one dwelling shall be disregarded under this paragraph.

28. Where property is held under a trust, other than—

(a) a charitable trust within the meaning of the Charities Act 1993 ^{M53}; or

(b) a trust set up with any payment to which paragraph 16 of this Schedule applies,

and under the terms of the trust, payments fall to be made, or the trustees have a discretion to make payments, to or for the benefit of the claimant or the claimant's partner, or both, that property.

Marginal Citations

M53 1993 c. 10.

SCHEDULE VI

Regulation 17(9)

SUMS DISREGARDED FROM CLAIMANT'S EARNINGS

1.—(1) In a case where a claimant is a lone parent, £20 of earnings.

(2) In this paragraph—

(a) “lone parent” means a person who has no partner and who is responsible for, and a member of the same household as, a child;

(b) “child” means a person [^{F632}who is a qualifying young person [^{F633}within the meaning of regulation 4A] or] a child [^{F634}as defined in section 40 of the 2012 Act].

Textual Amendments

F632 Words in Sch. VI para. 1(2)(b) substituted (10.4.2006) by [The Social Security \(Young Persons\) Amendment Regulations 2006 \(S.I. 2006/718\)](#), regs. 1(2)(a), **6(6)**

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Changes to legislation: There are currently no known outstanding effects for the State Pension Credit Regulations 2002. (See end of Document for details)

- F633** Words in Sch. VI para. 1(2)(b) inserted (28.7.2016) by The Housing Benefit and State Pension Credit (Temporary Absence) (Amendment) Regulations 2016 (S.I. 2016/624), regs. 1, **4(10)** (with reg. 5(3))
- F634** Words in Sch. VI para. 1(2)(b) substituted (28.7.2016) by The Housing Benefit and State Pension Credit (Temporary Absence) (Amendment) Regulations 2016 (S.I. 2016/624), regs. 1, **4(10)** (with reg. 5(3))

2. In a case of earnings from employment to which sub-paragraph (2) applies, £20.

(2) This paragraph applies to employment—

^{F635}(a)

^{F636}(aa)

^{F637}(ab)

[^{F638}(a) a part-time fire-fighter employed by a fire and rescue authority under the Fire and Rescue Services Act 2004 or by the Scottish Fire and Rescue Service established under section 1A of the Fire (Scotland) Act 2005;]

(b) as an auxiliary coastguard in respect of coast rescue activities;

(c) in the manning or launching of a lifeboat if the employment is part-time.

[^{F639}(d) a member of any territorial or reserve force prescribed in Part I of Schedule 6 to the Social Security (Contributions) Regulations 2001]

Textual Amendments

F635 Sch. VI para. 2(2)(a) revoked (S.) (2.8.2005 for specified purposes; (E.W.) (29.10.2013) in so far as not already in force) by The Fire (Scotland) Act 2005 (Consequential Provisions and Modifications) Order 2005 (S.I. 2005/2060), art. 1(2)(f), **Sch. para. 16(a)**; (S.I. 2013/2536), reg. 10(5)(a)

F636 Sch. VI para. 2(2)(aa) omitted (E.W.) (29.10.2013) by virtue of The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2013 (S.I. 2013/2536), regs. 1(1), **10(5)(b)**

F637 Sch. VI para. 2(2)(ab) omitted (S.) (29.10.2013) by virtue of The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2013 (S.I. 2013/2536), regs. 1(1), **10(5)(c)**

F638 Sch. VI para. 2(2)(a) inserted (29.10.2013) by The Social Security (Miscellaneous Amendments) (No. 3) Regulations 2013 (S.I. 2013/2536), regs. 1(1), **10(5)(d)**

F639 Sch. VI para. 2(2)(d) added (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 13(a)**

[^{F640}**2A.** Where a person is engaged in one or more of the employments specified in paragraph 2 but his earnings derived from those employments are less than £20 in any week and he is also engaged in any other employment, so much of his earnings from that other employment as would not in aggregate with the amount of his earnings disregarded under paragraph 2 exceed £20.]

Textual Amendments

F640 Sch. VI para. 2A inserted (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 13(b)**

[^{F641}**2B.** Where only one member of a couple is in employment specified in paragraph 2(2), so much of the earnings of the other member of the couple as would not, in aggregate with the earnings disregarded under paragraph 2, exceed £20.]

Textual Amendments

F641 Sch. VI para. 2B added (6.10.2003) by [The State Pension Credit \(Transitional and Miscellaneous Provisions\) Amendment Regulations 2003 \(S.I. 2003/2274\)](#), regs. 1, **2(13)**

3.—(1) If the claimant or one of the partners is a carer, or both partners are carers, £20 of any earnings received from his or their employment.

(2) In this paragraph the claimant or his partner is a carer if paragraph 4 of Part II of Schedule I (amount applicable for carers) is satisfied in respect of him.

4.—(1) £20 is disregarded if the claimant or, if he has a partner, his partner—

(a) is in receipt of—

(i) long-term incapacity benefit under Section 30A of the 1992 Act^{M54};

(ii) severe disablement allowance under section 68 of that Act;

(iii) attendance allowance;

(iv) disability living allowance under section 71 to 76 of that Act;

(v) any mobility supplement under [^{F642}article 20 of the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 2006]^{M55} (including such a supplement by virtue of any other scheme or order) or under article 25A of the Personal Injuries (Civilians) Scheme 1983^{M56}; ^{F643} ...

[^{F644}(vi) the disability element or the severe disability element of working tax credit under Schedule 2 to the Working Tax Credit (Entitlement and Maximum Rate) Regulations 2002; or]

[^{F645}(vii) employment and support allowance; ^{F646} ...]

[^{F647}(viii) personal independence payment; ^{F648} ...]

[^{F649}(viiiia) adult disability payment;]

[^{F650}(ix) armed forces independence payment; or]

[^{F651}(b) is or are certified as severely sight impaired or blind by a consultant ophthalmologist.]

(2) Subject to sub-paragraph (4), £20 is disregarded if the claimant or, if he has a partner, his partner has, within a period of 8 weeks ending on the day in respect of which the claimant first satisfies the conditions for entitlement to state pension credit, had an award of income support^{F652}, income-based jobseeker's allowance or income-related employment and support allowance] and—

(a) £20 was disregarded in respect of earnings taken into account in that award;

(b) the person whose earnings qualified for the disregard continues in employment after the termination of that award.

(3) Subject to sub-paragraph (4), £20 is disregarded if the claimant or, if he has a partner, his partner, immediately before attaining pensionable age,—

(a) had an award of state pension credit; and

(b) a disregard under paragraph 4(1)(a)(i) or (ii) was taken into account in determining that award.

(4) The disregard of £20 specified in sub-paragraphs (2) and (3) applies so long as there is no break, other a break which does not exceed 8 weeks,—

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- (a) in a case to which sub-paragraph (2) refers, in a person’s entitlement to state pension credit or in employment following the first day in respect of which state pension credit is awarded; or
- (b) in a case where sub-paragraph (3) applies, in the person’s entitlement to state pension credit since attaining pensionable age.

^{F653}(5)

Textual Amendments

- F642** Words in Sch. VI para. 4(1)(a)(v) substituted (5.1.2009) by The Social Security (Miscellaneous Amendments) (No. 7) Regulations 2008 (S.I. 2008/3157), regs. 1(1), **4(7)**
- F643** Word in Sch. VI para. 4(1)(a)(v) omitted (27.10.2008) by virtue of The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(10)(a)(i)**
- F644** Sch. VI para. 4(1)(a)(vi) added (6.10.2003) by The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 13(c)(i)**
- F645** Sch. VI para. 4(1)(a)(vii) added (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(10)(a)(ii)**
- F646** Word in Sch. VI para. 4(1)(a)(vii) omitted (8.4.2013) by virtue of The Personal Independence Payment (Supplementary Provisions and Consequential Amendments) Regulations 2013 (S.I. 2013/388), reg. 2, **Sch. para. 27(8)(a)**
- F647** Sch. VI para. 4(1)(a)(viii) inserted (8.4.2013) by The Personal Independence Payment (Supplementary Provisions and Consequential Amendments) Regulations 2013 (S.I. 2013/388), reg. 2, **Sch. para. 27(8)(b)**
- F648** Word in Sch. VI para. 4(1)(a)(viii) omitted (8.4.2013) by virtue of The Armed Forces and Reserve Forces Compensation Scheme (Consequential Provisions: Subordinate Legislation) Order 2013 (S.I. 2013/591), art. 2(2), **Sch. para. 23(8)(a)**
- F649** Sch. VI para. 4(1)(a)(viiiia) inserted (21.3.2022) by The Social Security (Disability Assistance for Working Age People) (Consequential Amendments) Order 2022 (S.I. 2022/177), arts. 1(2), **8(7)**
- F650** Sch. VI para. 4(1)(a)(ix) inserted (8.4.2013) by The Armed Forces and Reserve Forces Compensation Scheme (Consequential Provisions: Subordinate Legislation) Order 2013 (S.I. 2013/591), art. 2(2), **Sch. para. 23(8)(b)**
- F651** Sch. VI para. 4(1)(b) substituted (with effect in accordance with reg. 1(2) of the amending S.I.) by The Universal Credit and Miscellaneous Amendments (No.2) Regulations 2014 (S.I. 2014/2888), regs. 1(1), **3(4)(c)**
- F652** Words in Sch. VI para. 4(2) substituted (27.10.2008) by The Employment and Support Allowance (Consequential Provisions) (No. 2) Regulations 2008 (S.I. 2008/1554), regs. 1(2)(b), **4(10)(b)**
- F653** Sch. VI para. 4(5) omitted (6.10.2003) by virtue of The State Pension Credit (Consequential, Transitional and Miscellaneous Provisions) (No. 2) Regulations 2002 (S.I. 2002/3197), reg. 1(1)(b), **Sch. para. 13(c)(ii)**

Marginal Citations

- M54** Section 30A was inserted by Social Security (Incapacity for Work) Act 1994 (c. 18).
- M55** S.I.1983/883.
- M56** S.I.1983/686; amended by S.I.1983/1164 and 1540 and 1986/628.

^{F654}**4A.**—(1) £20 is the maximum amount which may be disregarded under any of paragraphs 1, 2, 3 or 4 notwithstanding that—

- (a) in the case of a claimant with no partner, he satisfies the requirements of more than one of those paragraphs or, in the case of paragraph 4, he satisfies the requirements of more than one of the sub-paragraphs of that paragraph; or

(b) in the case of [^{F655} couples], both partners satisfy one or more of the requirements of paragraphs 2, 3 and 4.

(2) Where, in a case to which sub-paragraph (1)(b) applies, the amount to be disregarded in respect of one of the partners (“the first partner”) is less than £20, the amount to be disregarded in respect of the other partner shall be so much of that other partner’s earnings as would not, in aggregate with the first partner’s earnings, exceed £20.]

Textual Amendments

F654 Sch. VI para. 4A inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 13(d)**

F655 Word in Sch. VI para. 4A(1)(b) substituted (5.12.2005) by [The Civil Partnership \(Pensions, Social Security and Child Support\) \(Consequential, etc. Provisions\) Order 2005 \(S.I. 2005/2877\)](#), art. 1, **Sch. 3 para. 35(6)** (with art. 3)

5. Except where the claimant or his partner qualifies for a £20 disregard under the preceding provisions of this Schedule—

(a) £5 shall be disregarded if a claimant who has no partner has earnings;

(b) £10 shall be disregarded if a claimant who has a partner has earnings.

6. Any earnings[^{F656}, other than any amount referred to in regulation 17(9)(b),] derived from any employment which ended before the day in respect of which the claimant first satisfies the conditions for entitlement to state pension credit.

Textual Amendments

F656 Words in Sch. VI para. 6 inserted (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 13(e)**

[^{F657} Any banking charges or commission payable in converting to Sterling payments of earnings made in a currency other than Sterling.]

Textual Amendments

F657 Sch. VI para. 7 added (6.10.2003) by [The State Pension Credit \(Consequential, Transitional and Miscellaneous Provisions\) \(No. 2\) Regulations 2002 \(S.I. 2002/3197\)](#), reg. 1(1)(b), **Sch. para. 13(f)**

EXPLANATORY NOTE

(This note is not part of the Regulations)

The Regulations contained in this Instrument are made either by virtue of, or in consequence of, provisions in the State Pension Credit Act 2002 (c.16) (“the 2002 Act”). This Instrument is made before the expiry of the period of 6 months beginning with the coming into force of those provisions; the regulations in it are therefore exempt in accordance with section 173(5) of the

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Social Security Administration Act 1992 from the requirement in section 172(2) of that Act to refer proposals to make Regulations to the Social Security Advisory Committee and are made without reference to that Committee.

Part I of these Regulations contains provisions relating to citation, commencement and interpretation.

In Part II of the Regulations, regulations 2 to 5 contain provisions relating to claimants who are absent from Great Britain. Regulations 6 and 7 relate to the amounts of the guarantee credit and savings credit. Provision is included for additional amounts to be included when the claimant or his partner is severely disabled or has housing costs (Schedules 1 and 2).

Regulation 9 specifies the income which is to be taken into account in determining the amount of any savings credit.

Under section 6 of the 2002 Act, assessed income periods are with certain exceptions set when a decision is made awarding state pension credit. Regulations 10 and 12 contain provisions relating to changes in income during the assessed income period and to the ending of that period.

Part III of the regulations contains provision for the calculation of income and capital. "Income" is defined for the purpose of the 2002 Act in section 15(1) of that Act but contains powers enabling further provisions to be made in Regulations. Regulation 15 contains provisions about income, including (at regulation 15(6)) provision for a deemed weekly income on capital over £6,000 (£10,000 if the claimant is in certain residential accommodation) at a rate of £1 for every £500. Other provisions relate to notional income (regulation 18) and income paid to third parties (regulation 24). Regulations 20 to 24 contain provisions relating to the calculation of capital, including capital held outside the United Kingdom, capital jointly held and notional capital; regulation 22 provides for a diminishing notional capital rule. Schedules 4 to 6 provide for certain capital and income to be disregarded in the calculation of the claimant's capital and income.

Part IV contains separate provision relating to the reduction in state pension credit in a case where the claimant has been convicted of benefit offences on at least 2 separate occasions.

The impact on business of applying these Regulations is minimal and the publication of a regulatory impact assessment is therefore not necessary. A summary of the contents of the assessment made for the State Pension Credit Bill was published at paragraphs 183 and 184 of the Explanatory Notes relating to the Bill. A copy of the summary can be obtained from the Department for Work and Pensions, Regulatory Impact Unit, 3rd Floor, The Adelphi, 1-11 John Adam Street, London WC2N 6HT.

Status:

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