

Benefit Take-Up Strategy

2026-2031



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Ministerial foreword

When people receive the support they are entitled to, it helps protect them from financial hardship, supports the wellbeing of children and families, recognises the additional costs of disability, ill health and caring responsibilities and provides a safety net from which people can live healthy and secure lives. That is why maximising benefit take-up matters. Every person, family or child who misses out on support they are entitled to is a missed opportunity to reduce poverty, improve wellbeing and build financial security for the people of Scotland.

No one should miss out on the support that they are entitled to because they do not know it exists, do not know who to turn to for advice, don't feel safe, respected and confident accessing support or find the system too difficult to navigate. Yet we know that, for some people, these barriers are real. They are often also felt most sharply by those already facing disadvantage, including disabled people, carers, older people, minority ethnic communities, children and families, and people in rural and island communities.

Over the last five years, Scotland's social security system has continued to grow and develop, with Social Security Scotland now providing support to around two million people. The previous Benefit Take-Up Strategy in 2021 has helped build the foundations of benefit take-up activity in Scotland, with a strong focus on raising awareness of newly devolved benefits and helping people understand what support is available.

As the system has developed, so too has our understanding of what is needed next.

How people interact with public services reflects the reality of their own life and its different stages. Whether that's becoming a parent or carer, receiving a diagnosis, experiencing bereavement, starting a job, leaving care or trying to support their family through difficult circumstances. At those moments, people should not have to navigate a set of separate systems or multiple organisations, or become experts in the social security system, to access the help they are entitled to.

This Strategy therefore sets out how we will work towards a more joined-up, proactive and person-centred system of support that helps ensure people receive what they are entitled to. A system where services work better together, people receive the right information at the right time, and trusted organisations can help connect people to the support they need.

Improving benefit take-up fundamentally supports our mission to eradicate child poverty. The new activity in this Strategy also forms part of our on-going approach to public service reform, ensuring the people of Scotland achieve positive outcomes by helping services become more effective and efficient. This is done through ensuring they are preventative, more connected and more responsive to people's lives.

This Strategy has been informed and shaped by evidence, stakeholder insight and lived experience. We have listened to people who have accessed social security support, to organisations who support people to do so, and to partners working in communities across Scotland. They told us about the importance of trust, clear information, practical support to apply and services that feel connected rather than fragmented. They also told us that stigma, complexity, digital exclusion, repeated requests for information and lack of joined-up support from different public and other services still prevent people from accessing their entitlements.

That insight is at the heart of this Strategy. Over the next five years, we will focus action across four areas: improving data sharing, signposting and referrals; strengthening pre-application support; delivering data-led awareness-raising, outreach and engagement; and making processes more accessible while exploring where automation can reduce administrative burdens. Taken together, these areas will help us build a system that is understood, straightforward to access and better organised around people's lives.

The Scottish Government cannot maximise benefit take-up alone. Social Security Scotland, local authorities, the UK Government, advice providers, health and social care services, third-sector organisations, community groups and individuals all have a role to play. I am grateful to everyone who has contributed to the development of this Strategy, and to those who will help deliver its outcomes over the years ahead.

Our ambition for 2031 is clear: a Scotland where people understand their rights, know where to turn for support, and can safely access what they are entitled to with confidence – and one in which they are treated with dignity, fairness and respect. A Scotland where services work together around people's needs, rather than expecting people to navigate complex systems alone. A Scotland where social security continues to be seen as a critical investment in people, families and communities across the country, not as a burden on public finances.

By working together and by keeping dignity, fairness and respect at the centre of everything we do, we will make meaningful progress towards that ambition.

[Shirley-Anne Somerville](#)

Cabinet Secretary for Social Justice and Housing



Executive summary

Why this Strategy matters

Scottish Ministers have a statutory duty under the Social Security (Scotland) Act 2018 to promote take-up of the assistance people are entitled to, and to publish a Benefit Take-Up Strategy setting out the steps Ministers intend to take to do this. This Strategy fulfils that duty for the period 2026-2031.

Maximising take-up is central to reducing poverty, improving wellbeing and helping people realise their rights. It increases household incomes, supports family finances, recognises the additional costs of disability, ill health and caring, and helps people access support before financial pressures escalate. It also contributes to Scotland's wider ambitions for tackling child poverty and Public Service Reform by helping services become more preventative, joined up and organised around and responsive to people's needs.

Data sharing as a driver of change

A central ambition of this Strategy is to explore how lawful, transparent and trusted data sharing can support a more proactive and preventative system of support. Better use of information already held across public services can help identify need earlier, reduce duplication and connect people to support more effectively.

A whole system approach to take-up

Reserved benefits, particularly Universal Credit and Pension Credit, can play an important role in helping people access wider support, including help with the costs of childcare. For many households, entitlement to a reserved benefit can act as a gateway to Scottish Government benefits, local authority support and other forms of financial assistance.

This Strategy will therefore place greater emphasis on helping people understand and access their full entitlements through clearer routes into free advice and income maximisation support and better join up with the UK Government.

Our ambition for 2031

By 2031, our ambition is for Scotland to have a more joined-up, proactive and accessible approach to benefit take-up that also maximises people's access to other relevant support.

This means moving from a system that too often relies on people finding their own way through complexity, towards one that identifies need earlier, connects services more effectively and supports people before financial pressures escalate.

Our ambition is that benefit take-up is understood not as a standalone activity, but as a core part of how Scotland reduces poverty, improves financial wellbeing and delivers more preventative public services, ultimately improving outcomes for people across Scotland.

We want people to:

- understand their rights and know what support they are entitled to;
- know where and how to access the support they are entitled to;
- feel safe, respected and confident accessing support;
- access support without needing to navigate complex systems alone;
- get the right support at the right time; and
- experience a faster, simpler and more predictable application journey.



Our four priority areas

The Strategy is built around four priority areas, set out below, where evidence demonstrates we can make the greatest difference to these outcomes. Progress in these areas will be delivered in three phases over the lifetime of the Strategy:

Phase one: Maximising current support

Phase two: Testing and developing new approaches

Phase three: Embedding successful approaches

1. Data sharing, signposting and referrals

This area focuses on how services gather and use information and connect people to support. It will strengthen lawful and trusted data sharing, make signposting to additional relevant entitlements and services more consistent, and develop referral pathways where people need more active support than information alone can provide.

Signposting means making clients aware of other relevant services, information or support that may be helpful to them. It does not involve Social Security Scotland sharing a client's personal data with another organisation, and the next step remains with the client to decide whether and how to contact or access the service they have been signposted to. This is distinct from a referral pathway, where information may be passed between services with the appropriate legal basis, consent and safeguards in place and someone may be proactively offered further relevant support as a result.

2. Pre-application support

This area focuses on the support people need before they apply. It will make understandable and accessible information, free and independent advice, advocacy and practical help easier to access at key life events through trusted organisations, local services and community settings.

3. Awareness raising, outreach and engagement

This area focuses on reaching people who are less likely to hear about, engage with or apply for support. It will use evidence, lived experience and local insight to tailor outreach effectively, while promoting accessible, culturally competent and stigma-free messages that reinforce social security as a human right. This is particularly important for ensuring that barriers to take-up are tackled for seldom-heard groups.

4. Accessible processes and automation

This area focuses on making the journey into and through different stages of applying for and receiving entitlements and support that people are eligible for, simpler and less burdensome. It will improve accessibility, identify where processes can be simplified, and explore where automation or linked-entitlement approaches can reduce unnecessary applications, repeated evidence requests and avoidable administrative burdens for both clients and organisations.

Measuring success

Success will not be measured by benefit take-up rates alone. This Strategy sets out clear outcomes we expect to see where a more accessible, easy to use and joined-up service is delivered. Progress will also be assessed by whether people better understand their rights, know where to turn for support, feel confident accessing services and can get help without navigating complex systems alone.

Teams delivering activity under the Strategy will be expected to consider how their work contributes to these outcomes and, where appropriate, gather evidence to demonstrate progress and impact. This may include monitoring information, operational data, service performance information, evaluation findings, stakeholder feedback, lived experience and client insight.

Where new approaches, services or pilots are developed, monitoring and evaluation arrangements will be agreed as part of implementation planning. Progress will be reported through future benefit take-up publications, alongside take-up estimates where robust data is available, and will be used to inform learning and improvement over the lifetime of the Strategy.



1. Why maximising benefit take-up matters

Social security as a human right

Social Security Scotland's Charter¹ states that social security is a human right, an investment in the people of Scotland, and a public service that any of us could need at any time. It protects people from financial hardship, supports children and families, recognises the additional costs that can come with disability, ill health and caring responsibilities, and helps people live healthier and more secure lives.

Promoting benefit take-up is about upholding that right. It means ensuring that people understand what they are entitled to, know where to turn for support, and can access assistance without unnecessary barriers, stigma or complexity.

Scotland's social security system is built on the principles of dignity, fairness and respect. Those principles must be reflected not only in how benefits are delivered but in how people are supported to access them in the first place.

Our statutory duty

The Social Security (Scotland) Act 2018² places a duty on Scottish Ministers to promote take-up of Scottish social security entitlements.

The Act also requires Scottish Ministers to prepare and publish a Benefit Take-Up Strategy. The Strategy must set out Ministers' best estimate of the extent to which eligible people are receiving the assistance they are entitled to, and the steps Ministers intend to take during the Strategy's lifetime to promote take-up. A new Strategy must be prepared every five years.

In preparing the Strategy, Scottish Ministers must consult such persons as they consider appropriate. This must include people who have received assistance through the Scottish social security system, and people who work with or represent households whose income is adversely affected, or whose expenditure is increased because a member of the household has one or more protected characteristics under the Equality Act 2010.

The Act also recognises that promoting take-up depends on inclusive communication, accessible information, independent information, advice and advocacy, and the effective

1 Social Security Scotland (2024) [Our Charter](#)

2 Legislation UK (2018) [Social Security \(Scotland\) Act 2018](#)

use of available data. Ministers must have regard to the possibility that information obtained to determine eligibility for one type of assistance could be used to identify eligibility for other types of assistance.

Reducing child poverty and improving wellbeing

The Tackling Child Poverty Delivery Plan 2026-2031³ identifies income from social security and benefits in kind as one of the three drivers of poverty reduction, alongside income from employment and reducing the cost of living. It also recognises take-up as a critical part of increasing household incomes from social security.

When people receive support for which they are eligible, household incomes increase, financial pressures are reduced and families are better able to meet essential costs. This is particularly important for tackling child poverty. Social security payments, including devolved benefits such as Scottish Child Payment, play a direct role in putting money into families' pockets. The Tackling Child Poverty Delivery Plan states that Scottish Child Payment alone is estimated to keep 50,000 children out of relative poverty in 2026-27, and that improving take-up of both UK Government and Scottish Government benefits could reduce child poverty rates by up to a further three percentage points in 2030, representing around 30,000 children being lifted out of poverty⁴.

Maximising benefit take-up of this critical support is therefore central to Scotland's wider efforts to reduce poverty, improve financial wellbeing and support better outcomes for individuals, families and communities.

A joined-up approach to public services

Improving benefit take-up is not only about increasing access to financial assistance. It is also about making public services work better together so that people can access the right support at the right time.

This aligns directly with Scotland's Public Service Reform Strategy ambitions⁵. A more joined-up approach to benefit take-up, underwritten by lawful data sharing, improved signposting and implementation of referral pathways, can help services work together around people's needs, reduce duplication, and make better use of information to identify where and when people need different kinds of support and services. The Tackling Child Poverty Delivery Plan also highlights the importance of making best use of data to support children and families and improve public services.

By ensuring better join up across Social Security Scotland, local authorities, central government, health services, advice providers and community organisations, we can help people access the full package of support they are entitled to across devolved, reserved, local authority and wider services.

3 Scottish Government (2026) [Bringing Hope, Building Futures: Tackling child poverty delivery plan 2026-2031](#)

4 Scottish Government (2026) [Bringing Hope, Building Futures: Tackling child poverty delivery plan 2026-2031](#)

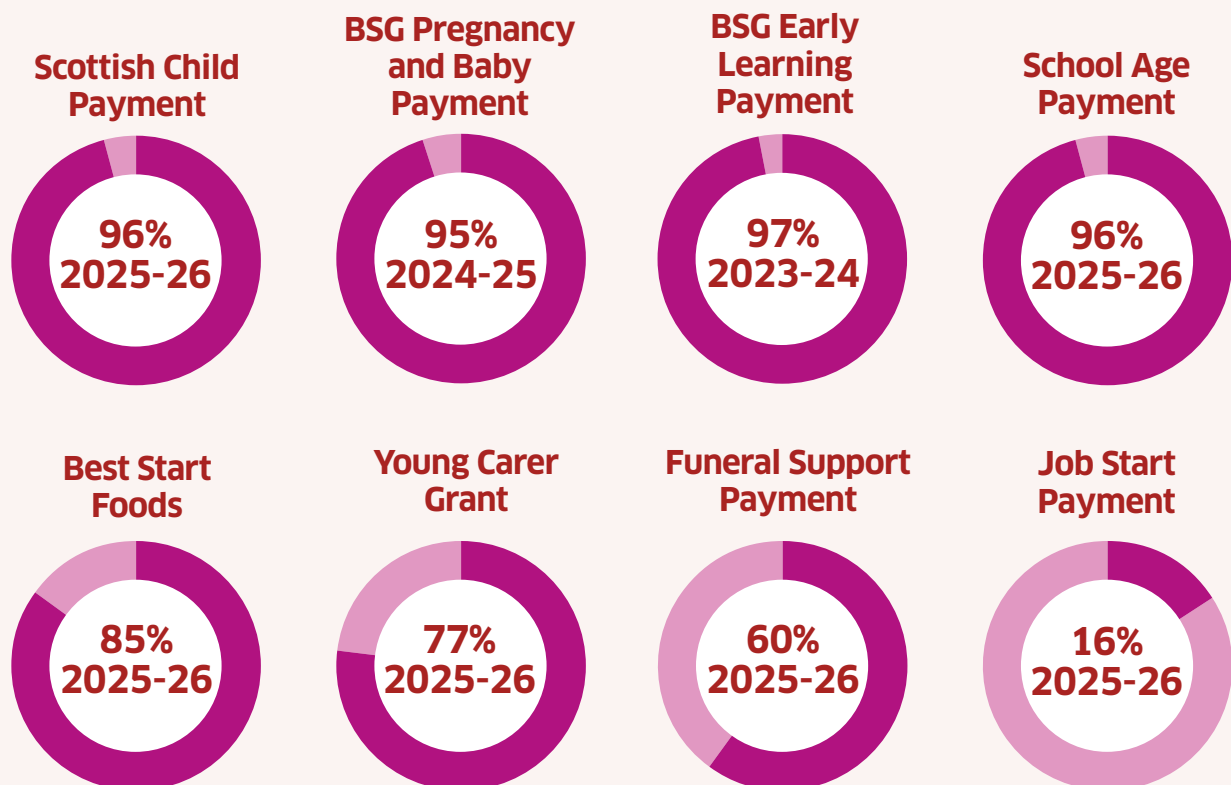
5 Scottish Government (2025) [Scotland's Public Service Reform Strategy: Delivering for Scotland](#)

2. Understanding the barriers to take-up

Benefit take-up in Scotland today

Take-up of most devolved social security benefits is high. Our latest estimate for the Scottish Child Payment finds take-up of 96%.

Figure 1: Take-Up Rates of Scottish Benefits:



A comprehensive examination of take-up rates is available in the accompanying analytical publication, *Take-up Rates of Scottish Benefits: October 2026*⁶. This publication sets out our estimated take-up rates for devolved benefits such as Scottish Child Payment. The publication also introduces modelled eligibility benchmarks for Adult Disability Payment and Child Disability Payment as a first step to addressing an evidence gap for take-up of disability benefits. This is analysis in development which shows how benefit receipt has changed relative to a consistently constructed measure, but the benchmarks are not estimates of take-up.

6 Scottish Government (2026). [Take-up Rates of Scottish Benefits 2026](#)

Barriers to accessing support

The barriers to benefit-take-up are well known. The first Benefit Take-Up Strategy, published in 2019⁷, identified the key barriers to take-up based on extensive evidence. These barriers included awareness of benefits, access to information and advice, the impact of stigma and a lack of trust in the system, and the complexity of applying for support. The 2021 Strategy⁸ reaffirmed these findings and recognised that improving take-up requires action across the wider system, not just awareness raising or promotion.

In 2024, we commissioned research into seldom heard groups⁹. This research demonstrated that these systemic barriers to access remain relevant across the social security system and are most acute for groups who are most at risk of missing out on support (seldom heard groups). The research found that barriers are often experienced differently depending on people's circumstances and that many individuals face multiple, overlapping barriers at the same time. It highlighted the importance of intersectionality, recognising that factors such as disability, ethnicity, age, gender, caring responsibilities, poverty, geography and previous experiences of public services can combine to shape how readily people access support and how easy it is for them to do so.

The research concluded that, rather than targeting action and focusing on individual groups, addressing the systemic barriers to access themselves is likely to be the most effective way of increasing take-up across the population, while also improving take-up among and outcomes for seldom-heard groups.

Psychological barriers

Psychological barriers include stigma, mistrust, fear of authority, previous negative experiences of public services, and the impact of trauma. These factors can discourage people from seeking support, identifying themselves as eligible, or engaging with the application process¹⁰. Stigma remains one of the most significant barriers to take-up, particularly where people feel embarrassed about submitting applications to benefits or fear being judged by others. Stigma is also reinforced by wider political, media and public narratives that misrepresent social security, its purpose, and the people who access and receive it.

The Get Heard Scotland Citizen Panel¹¹, facilitated by Poverty Alliance, also found that stigma remains one of the most significant barriers to benefit take-up. Participants described feeling ashamed of accessing support, fearful of being judged, and reluctant to discuss entitlements or eligibility with friends, family or their wider community. In some cases, people delayed submitting applications until they were experiencing severe financial hardship, despite being eligible for support. The research also found that poverty-related stigma often intersects with other forms of discrimination, including racism, ableism and gender-based stereotypes, creating additional barriers for some groups.

7 Scottish Government (2019) [Benefit Take-up Strategy 2019](#)

8 Scottish Government (2021) [Benefit Take-up Strategy 2021](#)

9 Scottish Government (2024) [Scottish social security system - seldom-heard groups: research](#)

10 Scottish Government (2025) [Seldom-Heard Groups Action Plan 2025-2026](#)

11 The Poverty Alliance (2024) [The impact of stigma on benefit take-up](#)

Compliance barriers

Compliance barriers arise where applying for or managing benefits is difficult, complex or burdensome. They can include inaccessible or difficult to understand application processes, difficulties in gathering and providing relevant evidence, challenges proving eligibility, delays between stages of the application process, limited support to complete applications and wider difficulties navigating the system. These barriers increase the effort and administrative burden required to access support, often at times where people are already experiencing distress or major life changes and can be particularly significant for people who already face disadvantage or additional support needs¹². Our commissioned research into the barriers to take-up for seldom heard groups¹³ found they are particularly acute for seldom-heard groups, increasing the “personal costs” of making an application and reducing take-up amongst them.

Social Security Scotland has sought to mitigate the impact of these barriers through delivering a more person-centred approach to applying for and receiving benefits. This includes simplifying processes, offering multiple application channels (online, phone and face-to-face), and embedding principles of dignity, fairness and respect at the heart of client interactions. However, complexity and administrative burdens remain a barrier to applying for benefits, particularly where people must navigate reserved, devolved and local systems to receive all the entitlements and support they are eligible for.

Learning barriers

Learning barriers include lack of awareness of benefits, uncertainty about eligibility, inaccessible or difficult to understand information, misinformation, language barriers, digital exclusion, and difficulty understanding how different benefits and services interact. These barriers can prevent people from recognising that they may be entitled to financial or other support, applying for it, or knowing where to go for trusted advice. This can be particularly challenging where devolved benefits, reserved benefits, local authority support and wider services are linked, but people are left to identify those connections themselves.

Evaluations of devolved benefits such as the Five Family Payments¹⁴ emphasise that clear communication and understanding of eligibility are essential to increase take-up. However, Public Health Scotland research¹⁵ highlights that awareness must be supported by trusted advice services and proactive engagement mechanisms.

12 House of Lords Library (2024) [Challenges faced by people with disabilities](#)

13 Scottish Government (2024) [Research into seldom-heard groups within the Scottish social security system](#)

14 Scottish Government (2025) [Evaluation of the Five Family Payments](#)

15 Public Health Scotland (2026) [Income maximisation in health settings project](#)

3. What we have learned

Learning from the 2021-2026 Strategy

The 2021 Benefit Take-Up Strategy was developed at an important stage in the creation of Scotland's devolved social security system. At that time, Social Security Scotland was still growing, new benefits were being introduced, delivery systems were continuing to develop, and benefit take-up activity had an important role to play in supporting recovery from the impact of COVID-19.

The 2021 Strategy established five guiding principles which have shaped Scotland's approach to improving benefit take-up over the last five years:

- prioritise person-centred approaches;
- communicate and engage effectively;
- bring services to people;
- encourage cross-system collaboration; and
- continuously learn and improve.

These principles provided the foundation for Scotland's approach to benefit take-up over the last five years. They helped coordinate activity, making information more accessible, strengthening person-centred support and developing partnerships to help people access their entitlements. They have also generated important learning about what works well, what barriers remain and where the next phase of benefit take-up activity should focus.

Social Security Scotland is now fully operational and, following completion of case transfer from the Department for Work and Pensions in 2025, has assumed responsibility for delivering a wide range of devolved benefits. This includes the delivery of new benefits unique to Scotland, like the Scottish Child Payment. This marks a major shift from establishing a new social security system to delivering a mature public service that reaches people across the country.

The period since 2021 has also seen important progress in reducing administrative barriers and improving take-up. Automatic payments and 'invite to apply' approaches for Best Start Grant payments have helped eligible people access support without having to identify and apply for every payment separately.

Awareness-raising activity has also increased through national and tailored campaigns informed by research and user insight, helping to reach people who may not engage through traditional channels. Campaigns are evaluated against key metrics to help

measure effectiveness, with learning fed into subsequent work to maximise the impact of spend in this area. For example, independent evaluation indicated that Social Security Scotland's Pension Age Disability Payment campaign, which ran in 2025, drove a 15-percentage point increase in awareness of the benefit amongst those with a disability or condition. A 140% increase in visits to relevant mygov.scot pages was observed when compared to the previous month.

Partnership working has also expanded at both local and national levels. Collaboration with local authorities, third sector organisations and other partners has supported outreach activity, improved information sharing and enabled earlier identification of need, helping to build trust and extend the reach of the social security system.

We have continued to learn from benefit evaluations, research, stakeholder engagement and the experiences of people who use the system. This has helped identify both what is working well and where further action is needed. For example, evidence highlighted a gap in our understanding of the experiences of seldom heard groups, leading to dedicated research and the subsequent development of our 2025-26 Seldom Heard Groups Action Plan¹⁶.

Delivery since 2021 has also shown that achieving genuinely coordinated support across services remains particularly challenging. Although signposting to additional relevant services by frontline staff, partnership working and local support have improved, many people still need to navigate multiple organisations and systems to access their full entitlement across devolved benefits, reserved benefits, local authority support and wider services. This remains a barrier to the delivery of truly person-centred, holistic and whole family support.

The 2026-2031 Benefit Take-Up Strategy will therefore build on the principles of the 2021 Strategy, applying them to a more developed social security system and a wider landscape of support. Over the next five years, we will place greater emphasis on coordinated services at all levels, enhanced data sharing and better use of data, improved signposting and referral pathways and strengthened pre-application support. This will help move Scotland closer to a truly joined-up system, where people are supported to access their full entitlement regardless of where they first seek help, and support is delivered in such a way that it maximises positive outcomes for the people who need it.

Key lessons from delivery since 2021 are that:

- awareness of benefits remains important, but it is only one factor influencing benefit take-up;
- trust is fundamental to engagement with the social security system and other services;
- support is most effective when delivered through and communicated by trusted people, organisations and communities;
- practical support before an application can be as important as support during the application process;

16 Scottish Government (2025) [Our Seldom-Heard Action Plan 2025-2026 - Seldom Heard Groups Action Plan](#)

- fragmentation and duplication between services can create barriers for people trying to access their full entitlements; and
- a more coordinated, proactive and person-centred approach is needed to maximise take-up of entitlements and support over the next five years.

Learning from the Seldom Heard Groups Action Plan

The 2021 Strategy committed to improving our understanding of the barriers to take-up experienced by people least likely to access the support available to them. To deliver on this commitment, the Scottish Government commissioned independent research into seldom-heard groups and the impact of stigma on benefit take-up. This included the evidence review¹⁷ of seldom-heard groups within the Scottish social security system and a Get Heard Scotland Citizens' Panel¹⁸, facilitated by the Poverty Alliance, on how stigma affects take-up.

The Seldom Heard Groups Action Plan 2025-26¹⁹ sets out our response to this evidence. It translated the issues identified through research and engagement into practical action in the lead-up to this Strategy.

Actions implemented through the Plan included developing an inclusive communication resources hub for staff; piloting trauma-informed training for frontline staff, enhancing consideration of seldom-heard groups within equality impact assessment processes and strengthening requirements for the Social Security Independent Advocacy Service to build relationships with organisations working with seldom-heard groups.

The Plan also reinforced the importance of stigma-free and trauma-informed approaches. Social Security Scotland's Tackling Stigma campaign, which ran in 2026, sought to promote social security as a right, challenge negative perceptions and normalise applying for benefits. Campaign tracking showed positive movement among target audiences, including increases in the proportion of unpaid carers and people with a disability or relevant condition who said they would apply for a benefit if they thought they were eligible.

That learning has informed this Strategy by reinforcing the need to combine system-wide improvements with tailored approaches for people and communities most at risk of missing out. It also strengthens the expectation that actions delivered under this Strategy should show how they respond to the barriers people experience when applying for specific benefits and how they contribute to the outcomes set out in Section 4.

17 <https://www.gov.scot/publications/research-seldom-heard-groups-within-scottish-social-security-system/>

18 The Poverty Alliance (2024). [The impact of stigma on benefit take-up: Report of a Get Heard Scotland Citizens' Panel - May 2024](#).

19 Scottish Government (2025) [Our Seldom-Heard Action Plan 2025-2026 - Seldom Heard Groups Action Plan](#)

Learning from our engagement

In preparing this Benefit Take-Up Strategy, Scottish Ministers have a statutory duty to consult people who have received assistance through the Scottish social security system and people who work with or represent individuals living in households affected by low income or increased costs because of protected characteristics. We met this duty through a structured approach to engagement, bringing together strategic challenge, practitioner insight and lived experience.

Engagement was designed to build on the existing evidence base, not reproduce it. We used it to test outcomes and key areas for the strategy as these were developed, challenge whether the emerging direction of the Strategy reflected people's experiences and gather practical feedback on what would be needed over the next five years to improve take-up. This included testing the Strategy's emerging focus on data sharing, signposting and referrals; pre-application support; awareness raising, outreach and engagement; and accessible processes and automation. Our approach brought together three main sources of insight.

- **Strategic challenge from members of our Benefit Take-Up Stakeholder Reference Group.** The Group tested whether the emerging outcomes and priority areas reflected the evidence base, stakeholder expertise and the experiences of people most at risk of missing out. Its membership includes organisations working with those with protected characteristics, seldom-heard groups and communities most at risk of not accessing support. It will continue to provide advice, challenge, evidence and insight as actions in the Strategy are delivered.
- **Practitioner and delivery insight from organisations that support people to access social security,** including welfare rights advisers, community link workers, anti-poverty organisations, carers organisations, island and rural stakeholders, and community partners. This included engagement with organisations such as Citizens Advice Scotland welfare rights advisers, Voluntary Health Scotland network, Dumfries and Galloway Poverty and Inequalities Partnership, the Scottish Islands Federation and Coalition of Carers Scotland.
- **Lived experience from people and communities who face barriers to accessing social security support** including people living on low incomes, disabled people, care experienced young people, young carers, unpaid carers, older people and people living in rural and island communities. This included targeted engagement through routes such as MCR Pathways, Inclusion Scotland, Get Heard Scotland Citizens Panel discussions facilitated by the Poverty Alliance, Scottish Islands Federation and wider community network engagement. This helped ground the Strategy in people's real experiences.

What people told us

Throughout our engagement, people described a system that can feel difficult to understand, fragmented and hard to access without trusted support. Participants highlighted the impact of stigma, repeated requests for information, complex forms, uncertainty about eligibility and the pressure placed on people to navigate multiple services at difficult points in their lives.

We received a wide range of feedback which evidenced the importance of data sharing, reducing complexity, timely support and engaging with different communities directly. As a result, we based our thinking around the Strategy on the impact these aspects would have on people and have considered this with regard to an illustrative family throughout different stages of the Strategy. They help illustrate the complexity of the current benefits system and the barriers that many families face, whilst also highlighting the difference that accessing benefits can have on finances. It is important to note this is just an illustration and eligibility depends on individual circumstances.



The following comments from individuals are illustrative of the barriers people experience and the type of change this Strategy is intended to support.

“Better data sharing across agencies will stop clients from falling through gaps and not have to retell their stories.”



“I’d need to be on my knees before I’d apply.”



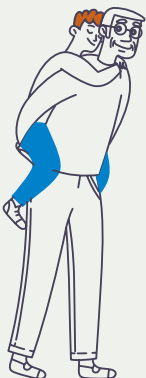
“No one will ever hold their hand up and say they are poor.”

“Carers need dedicated time and headspace to apply for things. Day to day life is so hard and relentless, many of us don’t have the physical opportunity to fill in forms.”



“People get better outcomes when they have someone with them supporting them that has the knowledge and skills to do so.”

“Repetitive questioning can make the process feel like it’s trying to catch you out.”



“The system is predicated to stop fraud, but it actually serves to disenfranchise the eligible.”

Data sharing, signposting and referrals

People and organisations strongly supported better connections and communication between services. We heard that people often need to contact multiple organisations, explain their circumstances repeatedly and provide the same information multiple times, and understand complex distinctions between devolved, reserved and local levels and forms of support. Participants saw value in better data sharing between organisations and levels of government where it could reduce duplication, prevent people falling through gaps and ensure that people do not have to provide the same information multiple times in difficult circumstances. People were clear, however, that this data sharing should be transparent, consent-based where required, accountable and built on public trust.

We also heard that simply signposting people on to other services or entitlements, whether in a conversation or in other forms of communication, is not always enough to ensure that they access and receive the support they need. In some cases people receive information but are not supported to take the next step. This informed the Strategy's focus on lawful and trusted data sharing, more consistent signposting, and has shaped the steps set out in it for developing referral pathways that can enable the proactive identification and offering of additional relevant support and services to people who will benefit from this.

Pre-application support

People told us that the period before an application is often where barriers are most significant. Someone may be unsure whether they are eligible for a benefit, anxious about applying, unclear about what evidence is needed, or worried that receiving one form of support might affect another. People also described missed opportunities where services such as health, social care or education could have provided clearer information about or signposting to pre-application support at an earlier point.

Carers described the practical and emotional pressures that can make applying for entitlements difficult, including lack of time, energy and headspace. Throughout engagement with stakeholders and people with lived experience, trusted advice, advocacy and practical help were highlighted as essential to improving take-up. Participants also stressed the importance of independent third sector support, while noting that some services are already under pressure. This informed the Strategy's focus on improving coordinated pre-application support, ensuring its provision during key life events, and creating stronger links between Social Security Scotland, advice services, advocacy organisations and community partners.

Awareness raising, outreach and engagement

Stigma was one of the strongest themes across engagement. People described experiencing shame, fear of judgement and concern that accessing support could be seen negatively by others. Participants also told us that awareness of the difference between devolved, reserved and local support remains unclear, meaning people may not understand what Social Security Scotland does in comparison to the Department of Work and Pensions or their local authority, or how different forms of support connect and impact on each other.

We heard that communication is most effective when it comes through trusted routes, including community organisations, faith groups, schools, health and social care services, carers centres, advice providers, peer networks and local media. In rural and island communities, participants highlighted the importance of local relationships and the need to consider stigma, lack of anonymity and access to advice. This informed the Strategy's focus on evidence-led outreach, culturally competent and stigma-free messaging, and communications that connect people to practical advice and support.

Accessible processes and automation

People and practitioners described application processes that remain complex, repetitive and stressful. Panel members said forms can feel “overwhelming and intimidating”, and that repetitive questioning can make the process feel like it is trying to “catch you out”. Repeated requests for information can make people feel they are not believed and lead to their needing to relive difficult and stressful life events, while processes designed to prevent error or fraud can unintentionally create barriers for eligible people, particularly those with complex circumstances, trauma, communication needs or limited access to supporting evidence.

Digital exclusion was also a recurring issue. Participants supported simplifying processes, including better use of information, linked applications, clearer processing times and more visible progress updates. However, they stressed that automation must be transparent, accurate, consent-based where required, and supported by human help where needed. This informed the Strategy's focus on accessible processes, reducing duplication, maintaining choice and safeguards, and exploring automation where it can reduce administrative burden.

How this shaped the Strategy

Overall, engagement confirmed that improving benefit take-up requires action to reduce stigma, simplify processes, improve routes into advice and advocacy, make better use of information within and across services, and strengthen the connections between organisations. Participants valued independent advice, advocacy and third sector support, but also cautioned that public services should not rely on the third sector alone, particularly where local support may be limited.

This learning directly informed our priority areas in this Strategy:

- data sharing, signposting and referrals;
- pre-application support;
- awareness raising, outreach and engagement; and
- accessible processes and automation.

We will continue to use lived experience, stakeholder insight and partnership working throughout the lifetime of the Strategy. This will help ensure delivery remains responsive to the needs of people and communities most at risk of missing out on what they are entitled to, and that future activity continues to reflect the principles of dignity, fairness and respect at the heart of the Scottish social security system.

4. Our ambition for 2031

Our ambition is for Scotland to have a more joined-up, proactive and accessible approach to benefit take-up, helping people realise their rights and access the support they are entitled to when they need it.

This means moving from a system that relies on people navigating complexity themselves to one that identifies need earlier, connects services more effectively and provides support before financial pressures escalate.

Benefit take-up is not a standalone activity. It is central to reducing poverty, improving financial wellbeing and delivering more preventative public services by helping people access their full entitlements across devolved, reserved and local support.

What success looks like for the people of Scotland

By 2031, we want the people of Scotland to experience the following outcomes:

People understand their rights and know what support they are entitled to.

Individuals are aware of the assistance available to them and can recognise when they may be eligible for support.

People know where and how to access the support they are entitled to. Clear information, trusted advice and effective signposting ensure that people can easily find the help they need.

People feel safe, respected and confident accessing support. Social security is understood as a right, with services designed around dignity, fairness and respect, free from stigma and unnecessary barriers.

People access support without needing to navigate complex systems alone. Services work together more effectively, with trusted referral pathways, lawful information sharing and joined-up support that reduce fragmentation and confusion.

People get the right support at the right time. Earlier identification of need, stronger partnerships and more proactive approaches mean that people are connected to support before problems escalate.

People experience a faster, simpler and more predictable application journey. Processes are accessible, proportionate and easy to understand, making it easier for people to apply for and receive the support they are entitled to.

These outcomes provide the foundation for the priority areas set out in this Strategy.

5. Delivering change: our strategic approach for 2026-2031

Overview

The outcomes set out in Section 4 describe the change we want people to experience by 2031. This section sets out a strategic framework for how we will achieve those outcomes over the lifetime of the Strategy.

Our approach is built around four areas of progression where learning from evidence, engagement and delivery show that action can make the greatest difference to benefit take-up and people's experience of accessing support:

- data sharing, signposting and referrals;
- pre-application support;
- engagement, awareness raising and outreach; and
- accessible processes and automation.

The commitments set out under each area of progression provide a framework for action over the next five years (2026-2031). Delivery will be phased, allowing us to strengthen what already exists, test and refine new approaches, and embed successful approaches over time. This approach recognises that some improvements can be made within current systems and partnerships, while others will require further development, testing, investment, legislation or changes in how services work together.

Delivery will also need to remain responsive to wider Scottish Government and Social Security Scotland priorities, available resources, operational pressures and emerging evidence. We will therefore keep implementation under review throughout the lifetime of the Strategy.

Phased delivery

Phase 1: maximising current support

We will focus on making the most of existing services, partnerships, data and support routes. This includes strengthening signposting and referrals, raising awareness of available support, improving use of evidence and identifying opportunities for early improvements within current systems. This phase will run indicatively from 2026-2028.

Phase 2: testing and developing new approaches

We will test and develop more coordinated approaches to improving take-up and service join-up. This includes piloting new referral models, exploring opportunities for better data sharing and using evidence from delivery to understand what works and for whom. This phase will run indicatively from 2028-2030.

Phase 3 – embedding proactive and joined-up support

We will embed successful approaches that support long-term system change. This includes improving consistency across services, scaling effective models where appropriate and strengthening connections between services so support is more proactive, preventative and centred on people's needs. This phase will run indicatively from 2030-2031.

How the Strategy will deliver our outcomes

Outcome	Key areas of activity
People understand their rights and know what support they are entitled to	Awareness raising, outreach and engagement; signposting; pre-application support
People know where and how to access support	Signposting; referral pathways; pre-application support
People feel safe, respected and confident accessing support	Culturally competent communications; trauma-informed services; accessible processes
People access support without navigating complex systems alone	Referral pathways; pre-application support; data sharing
People get the right support at the right time	Data sharing; key life events support; tailored engagement
People experience a faster, simpler and more predictable application journey	Accessible processes; information reuse; automation

5.1 Data sharing, signposting and referrals

This area of progression supports Social Security Scotland's Charter commitment that people should be helped to access everything they are entitled to. By improving data sharing, signposting and referral pathways, we aim to reduce the burden on individuals and make it easier for people to access support through a more coordinated system.

The Scottish Government Public Service Reform Strategy²⁰ identifies data sharing and effective data usage as essential to delivering more preventative, integrated and efficient public services. It also highlights duplication, fragmented delivery and services that are difficult to navigate as system problems that must be addressed. The Tackling Child Poverty Delivery Plan²¹, similarly identifies better use of data as crucial to maximising take up of social security and benefits in kind and for delivery of Whole Family Support, which are both central to the Scottish Government's commitment to reducing child poverty.

However, to realise the full value of any future initiatives in data sharing and support benefit take-up objectives, Social Security Scotland will only share data where its quality is known, measurable, and understood. Without this transparency, data quality can become a systemic barrier to collaboration and an uninformed risk to both the organisation and its partners. Understanding data quality is not simply a technical requirement; it is a prerequisite for responsible data sharing.

It is the goal of Social Security Scotland, before sharing data with other stakeholders, that it should be assessed at source, and any transformed or aggregated data verified to ensure it accurately represents clients and their circumstances, enabling Social Security Scotland to support clients with initiatives relevant to their needs.

Used lawfully, proportionately and transparently, better use of information already held across public services can help identify need earlier, coordinate support across organisational boundaries, reduce duplication and direct help to where it will make the biggest difference. It is central to moving from a system that too often relies on people finding their own way through support services, towards one where services work together around people's lives. It also remains a key ask from stakeholders and people with experience of using the social security system and other relevant services. This is particularly the case where the requirement to share the same information multiple times with organisations or services can be exhausting at best, and re-traumatising at worst, with the potential for it to exacerbate the impact of stigma on people's willingness to apply for essential support.

Data sharing must be built on public trust. Engagement showed that people see value in information being used to reduce duplication and connect them to support earlier. Wider evidence highlights concerns about how information is collected and used, particularly where people are asked to provide sensitive information about income, disability, caring responsibilities or health²².

20 Scottish Government (2025) [Scotland's Public Service Reform Strategy: Delivering for Scotland](#)

21 Scottish Government (2026) [Building Hope, Building Futures: Tackling child poverty delivery plan 2026-2031](#)

22 Progressive Partnership (2025) [Framing a Minimum Income Guarantee](#)

Data sharing alone, however, will not improve take-up unless it leads to practical action, particularly where people are still coming into the system for the first time through their contact with frontline and client services staff. In this context, signposting and referrals are the routes through which the sharing of information can be turned into tangible support and better outcomes.

This area of progression sets out how social security will contribute to wider system change aligned to the Scottish Government's priorities of tackling child poverty and public service reform. It focuses on improving how information is used across devolved, reserved and local services, and how signposting and referral pathways can turn that information into practical support.

Achieving this will take time. It will require trusted partnerships, clear legal frameworks, operational readiness, digital capability, public confidence and careful prioritisation and targeted investment alongside wider pressures on resources. The commitments that follow therefore begin with what can be strengthened under current powers and existing practice, before testing and developing approaches that can be scaled safely, effectively and with public confidence. Progression beyond discovery and testing phases remains subject to operational feasibility, partner capacity, affordability, and delivery priorities.





Case study – Mairi

Our engagement with stakeholders and people with experience of the social security system highlighted how it can feel like a complex system to navigate. To help illustrate this we have created a fictional family below. This has helped to inform our thinking on the development of the actions set out in this section.

Mairi (38) is a lone parent who lives in Dumfries and Galloway with her daughter Rosa, aged 5, her son Jay, aged 3, and is expecting her third child.

Mairi has recently become a lone parent and is proud to work part-time in social care. She is also in receipt of Universal Credit. Planning her finances can be a challenge as her hours often fluctuate, alongside her childcare costs. Mairi is expecting her third child and her older child, Rosa, is starting school so she worries about the rising costs she is about to face: baby essentials, school uniform, lunches, travel, childcare and keeping the house warm.

Mairi hears from another mum at work that it might be worth getting in touch with Social Security Scotland as they deliver additional support to low-income families like hers. Mairi successfully applies for Scottish Child Payment which will help her buy the essentials she needs. Mairi is also automatically awarded Best Start Grant School Age Payment to support with the costs of Rosa starting school, without needing to complete a further application form. This is incredibly helpful at a time where she is juggling pregnancy, work and childcare. She also learns that Rosa will get free school meals automatically in primary 1-5 and, as Mairi is receiving Scottish Child Payment, Rosa will continue to receive free school meals until she reaches the end of primary 7. Mairi can also apply separately to her local council for the School Clothing Grant to help with the cost of Rosa's uniform and other essentials she needs for school.

At a time of intense pressure Mairi continues to find the benefit landscape confusing and time consuming. She needs to know what financial support is available to her, when it is available, who is best placed to provide advice on her circumstances, and keep track of when payments are expected in relation to rent, childcare and other household expenses. This includes navigating UK Government benefits (Universal Credit and Child Benefit), Social Security Scotland benefits, school support, local council help and advice services. Without clear and timely information about how this support fits together, Mairi could be at greater risk of missing out on financial support that she would be entitled to receive.

Commitment 1A: Data sharing for proactive support

Commitment: We will enable lawful, transparent and trusted data sharing and more effective use of information to support earlier identification of need and more coordinated access to entitlements and relevant wider support.

Aim: This commitment supports a shift from a system that primarily reacts to need towards one that can identify need earlier and connect people to support more proactively. It will help us understand where information already held across public services can be used safely and effectively to improve take-up, maximise household income and reduce the need for people to navigate services alone.

Contributes to outcomes: People access support without needing to navigate complex systems alone; people get the right support at the right time; people know where and how to access the support they are entitled to.

Phase 1 - maximising current support

This first phase will focus on what can be achieved within existing powers, partnerships, systems and resources, while building the legal, operational and public trust foundations needed for stronger data-sharing arrangements in future. This means establishing robust data quality assurances to provide the confidence required to support evidence-based decision making, future policy development and demonstrate due diligence in the responsible stewardship of public data.

Social Security Scotland is investing in the digital capability needed to support more effective information sharing, including through the development of its Data Sharing Hub. Phase 1 will align policy, legal, operational and public trust work with that capability, ensuring it is focused on practical opportunities to improve people's access to support.

Existing arrangements already demonstrate the value of using data effectively.

Social Security Scotland already receives information from the Department for Work and Pensions (DWP) to support the delivery of certain benefits and payments and worked closely with DWP to transfer responsibility for disability and carer benefits without requiring clients to make a new application. Data-sharing arrangements also support automated payments such as Carer's Allowance Supplement and Winter Heating Payment, as well as automatic awards of Best Start Grant Early Learning Payment and School Age Payment for eligible families receiving Scottish Child Payment.

Data sharing can also support Social Security Scotland to receive information needed to make decisions. The Scottish Government's Data Sharing Portal is also used by all 32 local authorities and other partners to support passported benefits and services. This allows organisations, where appropriate and within existing legal boundaries, to verify entitlement to qualifying Scottish benefits and can reduce the need for people to provide the same evidence repeatedly. Building on this experience, Phase 1 will consider both directions of information sharing: how Social Security Scotland information could help people access wider support, and how relevant organisations could share information with Social Security Scotland to support applications and reduce the need for people to obtain or provide the same evidence themselves.

The referral route from Social Security Scotland to the Social Security Independent Advocacy Service provides a practical example of how information sharing can connect someone to support. Where a disabled person needs advocacy to engage effectively with the social security system, Social Security Scotland staff can, with the person's agreement, submit a referral through a dedicated secure portal. The information provided helps the advocacy service understand the person's circumstances and support needs, reducing the need for them to explain their situation again from the beginning. It also allows the service to record where referrals originate and monitor whether people, including those from seldom-heard groups, are accessing support. This demonstrates how proportionate information sharing, supported by clear consent, safeguards, partner roles and operational processes, can turn the identification of need into practical assistance.

Data sharing to support free school meals provides another practical example of how information already held by one public service can remove barriers to accessing support elsewhere. A legal gateway enables Social Security Scotland to share relevant Scottish Child Payment information with local authorities so that they can identify eligible pupils and provide free school meals without requiring families to complete a separate application or prove their circumstances again. For a parent or carer, this means less paperwork and a lower risk of missing out simply because they were unaware of the entitlement or did not apply. It also demonstrates the wider potential of data sharing: information provided once can, with a clear legal basis and appropriate safeguards, lead directly to practical support through another public service.

This phase will use learning from those existing arrangements to identify where better use of information could have the greatest impact, where current powers are sufficient, and where further legal, operational, governance or data-sharing agreement changes may be required. It will also draw on existing support routes, including referrals from Social Security Scotland to the Social Security Independent Advocacy Service to understand what makes referrals work in practice. This includes the role of consent, safeguards, partner capacity and the information needed to connect people to support.

This phase will also build on existing work to improve how data is used within current delivery arrangements. For example, the Scottish Government is working with local authorities to identify improvements to the data received from the Department for Work and Pensions for the administration of Discretionary Housing Payments. In Scotland, local authorities do not need to wait for a formal application from a client and can take steps to make a payment when they are satisfied a client has been affected by one of the benefit reductions Scottish Ministers wish to mitigate. Improving the completeness and timeliness of this data is expected to support take-up of payments, including in mitigation of UK Government policies such as the benefit cap, while also reducing local authority administrative workload.

Alongside this, wider Scottish Government innovation activity will help inform future approaches. CivTech is exploring how technology can make data sharing across public sector organisations easier to manage where organisations have separate legal responsibilities. CivTech is a Scottish Government programme that brings public, private and third sector partners together to develop solutions to public sector challenges. This is relevant to benefit take-up because it can support tools and learning that

help us understand public attitudes to data sharing, including what would build trust, transparency and confidence in future approaches to data sharing between Social Security Scotland and other organisations and services for the purpose of maximising take-up of benefits and other entitlements and support.

By the end of this phase, we will have a clearer understanding of where lawful, proportionate, transparent and trusted data sharing can support take-up of devolved, reserved and local entitlements, help maximise incomes and improve access to relevant services and support. This could be particularly beneficial for disabled people, unpaid carers, priority families, people in island and rural communities, and seldom-heard groups, who may be more likely to interact with multiple services or need support from several organisations at the same time. This learning will help determine what can be strengthened within current arrangements, what requires further legal or operational development, and which approaches may be suitable for testing in Phase 2.

Phase 1 activity will include:

- building stronger understanding of public attitudes towards data sharing for the purposes of promoting take-up of benefits and other services, including financial wellbeing, income maximisation services and access to wider support. Understanding will be built through use of CivTech partner developed tools and engagement with people with lived experience and from seldom-heard groups.
- identifying and prioritising data-sharing use cases with the greatest potential to improve benefit take-up, maximise people's incomes and better join-up services. This will include assessing what legislative, governance, operational or data-sharing agreement changes may be required to deliver these.
- working across the Scottish Government, Social Security Scotland and delivery partners to identify, align and share learning from existing and planned data-sharing activity that supports public service reform, helps reduce child poverty and improves access to benefit-relevant entitlements and wider support, including for groups most at risk of missing out.
- reviewing learning and insight from existing referral pathways, including between Social Security Scotland the Social Security Independent Advocacy Service and other locally established pathways, to understand how information can be used most effectively and efficiently to identify need and connect people to the right support at the right time.

Phase 2 - testing and developing new approaches

Phase 2 will move from identifying and prioritising opportunities to testing priority data-sharing use cases in practice. The evidence gathered in Phase 1, will be used to decide which approaches are suitable for testing with partners.

This phase will align with Social Security Scotland's work to strengthen data and digital capability, including making it easier for authorised partners to access Social Security Scotland data where a clear legal basis and operational purpose exist. It will also explore how relevant organisations could share information more effectively with Social Security Scotland, to support applications and entitlement decisions. This could include considering whether supporting information held by health services, GPs, local authorities or other public bodies can be obtained more efficiently, reducing the need for people to gather and provide information already held elsewhere. As with all phases across the strategy, progress will remain subject to operational feasibility, partner capacity, affordability, and delivery priorities, which will be assessed ahead of each phase.

Testing will be proportionate, targeted and carefully managed. It will focus on approaches where there is evidence that better use of information could improve access to support, reduce duplication and overlap or help people receive the right information at the right time. In this, it will be responding to where we know there is appetite for these outcomes from people with experience of the social security system.

By the end of this phase, we will have a stronger evidence base to demonstrate which data-sharing approaches are lawful, effective, deliverable and capable of supporting more joined-up services across the wider public sector. Ultimately those that are able to best improve take-up of devolved, reserved and local entitlements, support income maximisation and financial wellbeing, and connect people most at risk of missing out to more holistic support relevant to their circumstances.

Phase 3 - embedding proactive and joined-up support

Building on the evidence, testing and delivery learning from Phases 1 and 2, the final phase will focus on embedding data-sharing approaches that have been shown to improve outcomes and can be delivered lawfully, proportionately and with public confidence.

Where testing shows that better use of information helps people access support earlier, successful approaches will be adopted more widely where this is feasible and appropriate. This could include embedding clearer data-sharing processes, referral pathways, or governance arrangements, as part of clarifying partner roles and operational guidance so that services can use information more consistently to identify need and connect people to support.

By this stage, data sharing should be supporting a more proactive and joined-up approach to promoting take-up. People should be less likely to have to repeat information, navigate separate systems alone, or rely on chance contact with the right service. Instead, information should be used more effectively to help people access their full entitlement across devolved, reserved and local support, while connecting them to relevant wider services, where appropriate.

The long-term outcome of this work should be a system that uses information more effectively to reduce fragmentation, improve take-up, increase household incomes and therefore reduce poverty and support wider public service reform. This will help ensure that data sharing becomes a practical enabler of more coordinated support, rather than a standalone technical exercise.

Commitment 1B: Building consistent signposting and best practice

Commitment: We will improve the consistency and evidence-based tailoring of signposting from Social Security Scotland to devolved, reserved and local services, ensuring people are directed to relevant financial wellbeing, advice, employability, housing, carers and wider support in a way that is clear, proportionate and appropriate to their circumstances.

Aim: This commitment will make signposting a more systematic part of service delivery. By improving guidance, tools, staff confidence and the use of evidence, we will create a more consistent client experience and make it easier for people to access the support they are entitled to from Social Security Scotland, local authorities, the UK Government, advice services and other relevant community services.

Contributes to outcomes: People understand their rights and know what support they are entitled to; people know where and how to access the support they are entitled to; people get the right support at the right time.

Phase 1 - maximising current support

Signposting already takes place across Social Security Scotland services, including through Local Delivery, client services, communications, digital channels and engagement activity. In Phase 1, the focus will be on maximising and learning from existing activity: understanding where signposting currently happens, where practice varies, and where clearer guidance or tools could support a more consistent client experience.

Effective signposting can help people understand where to go for further support, access relevant entitlements and services, and improve financial wellbeing where appropriate. However, signposting may be less effective for people facing additional or intersecting barriers, including disabled people, unpaid carers, minority ethnic communities, people whose first language is not English, people experiencing digital exclusion, and people in rural or island communities.

This phase will therefore focus on improving the quality, consistency and accessibility of signposting within existing systems, whilst learning from it. The aim is not for frontline staff to provide advice or bespoke casework support. Rather, it is to help staff recognise when a signpost may be useful and provide clear, proportionate and consistent information about relevant support to people applying for or receiving different benefits. This would include, for example, financial wellbeing, carers support, disability support, employability, housing, community health and trusted community organisations.

This work will also help us understand the limits of signposting. Signposting can be valuable where people are able to take the next step themselves, but it may not be enough where someone needs more active or tailored support, where they may have complex needs, where advice services are under pressure, or where a more structured referral pathway would be more appropriate. Learning from Phase 1 will therefore help identify the operational, partner and governance issues that need to be addressed before moving towards the implementation of referral pathways where this is lawful, proportionate and deliverable.

This phase will also complement implementation of Section 13 of the Care Reform (Scotland) Act 2025, which places a duty on public bodies to actively promote awareness and take-up of support available to unpaid carers. By improving identification, pathways and engagement, we can help more unpaid carers access the support available to them and contribute to a more preventative approach that reduces crisis demand and improves outcomes.

Phase 1 activity will include:

- improving consistency of signposting activity within Social Security Scotland by understanding current levels of signposting, staff awareness of existing guidance, training and support for frontline staff, variations in practice and operational impacts.
- reviewing opportunities to strengthen signposting to relevant reserved entitlements, including Universal Credit, Pension Credit and other forms of linked support, where appropriate. This will include considering how older clients receiving disability assistance and people receiving the Five Family Payments can be provided with clearer information on where to check whether they may be entitled to further support.
- working with stakeholders, including organisations representing seldom-heard groups and rural and island community organisations to identify where tailored or place-based signposting may be more appropriate than generic signposting, and use this learning to improve staff guidance, tools and client communications.

Phase 2 - testing and developing new approaches

Building on the operational learning from Phase 1, Phase 2 will focus on testing how signposting can be made more consistent across Social Security Scotland client journeys, communications and digital services. This phase will move from understanding current practice to developing approaches that can work more consistently across applications, notifications, digital channels, client communications and staff interactions.

This phase will also explore how digital tools and Social Security Scotland internal information can support more timely and relevant signposting. The aim is to help staff identify more quickly when a client may benefit from a signpost, reducing variation in practice and making better use of staff time while maintaining operational performance.

It will also include sharing learning with and from relevant public and third sector partners, where this can support greater consistency across services. This may include exploring shared communities of practice or other learning routes, while recognising that Social Security Scotland cannot determine practice across other organisations.

By the end of this phase, we will have a clearer understanding of how signposting can be scaled across operational and digital routes, how internal information can support more efficient staff decision-making, and where signposting remains insufficient. This will help define the staff, systems, data, governance and partner arrangements needed for referral pathways where these are lawful, proportionate and deliverable.

Phase 3 - embedding proactive and joined-up support

Building on the evidence and testing from Phases 1 and 2, the final phase will focus on embedding signposting approaches that have been shown to improve client experience, support access to entitlements and connect people to relevant wider support. By this stage, effective signposting should be a more routine and consistent part of Social Security Scotland services, including Local Delivery, client services, communications and digital routes.

The focus will be on making signposting easier and more efficient for staff, while improving the relevance of information provided to clients. This should include using Social Security Scotland data and internal processes to help client services staff identify when a signpost may be useful or impactful, reducing the time and judgement required to identify appropriate support.

Signposting will remain only one part of a more joined-up system. It can help people understand where to go for support, but it still relies on the client taking the next step and does not provide the same level of coordination or tracking of outcomes as a referral. The learning from earlier phases will therefore support the operationalisation of referral pathways, helping ensure that client services, systems, data, governance and partner arrangements are ready to move beyond signposting where this is lawful, proportionate and deliverable.

By the end of the Strategy period, effective signposting should support a wider model of proactive and joined-up support. This should help people, particularly disabled people, unpaid carers, priority families and seldom-heard groups, access devolved, reserved and local entitlements, improve financial wellbeing, and connect to wider support such as carers support, disability support, family support, employability, community health and trusted community organisations.

Commitment 1C: Coordinated referral pathways across public services

Commitment: We will develop and strengthen referral pathways across public services and partners, enabling people to access joined-up support without needing to navigate complex systems alone.

Aim: This commitment will help create a more joined-up system where organisations share responsibility for improving outcomes. By strengthening referral pathways, people will be more consistently connected to social security, income-maximisation and financial wellbeing support and other services that contribute to their wellbeing and resilience.

Contributes to outcomes: People access support without needing to navigate complex systems alone; people get the right support at the right time; people know where and how to access the support they are entitled to.

Phase 1 - maximising current support

A referral pathway means a structured process through which one service or organisation enables another service or organisation to receive information and proactively connect with a client who is likely to benefit or be eligible for additional entitlements or support.

The initial focus will be on early discovery and scoping, rather than immediate delivery or implementation of referral pathways. This means building a clearer understanding of where future structured referral pathways from Social Security Scotland could add value, what local and national support routes already exist, what partner capacity looks like, and what legal, operational, data, digital, safeguarding and governance issues would need to be addressed before any future referral model could be designed, tested or implemented.

At present, referral activity is often dependent on local arrangements, partner relationships and varying levels of capacity, readiness and appetite for information sharing. There is therefore no consistent approach across public services, third sector organisations and community partners for identifying when a referral would add value, what information can be shared, or how people are supported once a referral is made.

Existing partnership activity, including the Fairer Futures Partnerships²³, demonstrates the value of strong local relationships and multi-agency working in helping people access support across different services. It also highlights the importance of working carefully within current data-sharing limits, understanding partner capacity, and designing approaches that reflect local delivery arrangements, whilst highlighting the need to tackle current barriers to data sharing and implementation of referral pathways that would enable the provision of more timely, relevant and often vital support to people living in complex circumstances.

The scoping work in Phase 1 is not intended to deliver live referrals, appoint future delivery partners or commit the Scottish Government, Social Security Scotland, local authorities or advice-sector organisations to implementation. Instead, it will provide evidence to inform recommendations to Ministers in 2027/28 on whether, where and how

23 Scottish Government (2025) [Fairer Futures Partnership Programme: evaluation strategy](#)

more targeted service design, testing or pilot development may be appropriate in a later phase. Any move towards piloting would also depend on the appropriate legal gateway, consent model, governance arrangements, operational readiness, affordability and partner capacity being in place.

Phase 1 activity will include:

- providing short-term capacity funding in 2026/27 from Tackling Child Poverty Delivery Plan funding to support early discovery and scoping work with willing local authorities and relevant national third sector organisations. This funding will support structured evidence gathering on where future referral pathways from Social Security Scotland could add value, particularly in relation to wider income maximisation support for priority family groups.
- continuing engagement with COSLA, local authorities and relevant partners throughout the discovery and scoping phase, to ensure the work is informed by local delivery experience, existing referral routes, partner capacity, operational pressures and wider child poverty and income maximisation activity.
- undertaking internal discovery with Social Security Scotland to understand the operational, workforce, safeguarding, governance, data and delivery considerations that would need to be addressed before any future referral activity could be designed or tested.
- ensuring accessibility and disability inclusion are considered from the outset, including communication needs, access requirements and existing support routes for disabled people.
- using the evidence gathered to develop recommendations on where more targeted service design, testing or pilot development may be appropriate in the next phase of the Strategy.

Phase 2 - testing and developing new approaches

Building on the discovery and scoping work undertaken in Phase 1, Phase 2 will focus on developing more detailed proposals for referral pathway models. This phase will not assume that pilots will automatically proceed. Any decision to move from scoping into service design, testing or pilot activity will be subject to Ministerial consideration of the Phase 1 evidence and the identification of a suitable legal gateway, consent model, governance arrangements, funding, operational readiness and partner capacity.

Given the Strategy's focus on maximising incomes and improving financial wellbeing, further development may focus on referral models that connect people to welfare rights advice, income maximisation, money and debt advice, Whole Family Support or wider local services relevant to people's circumstances. This may include outward referrals from Social Security Scotland where Phase 1 evidence shows that these would add value and could be delivered safely without creating unmanageable burdens for clients, frontline staff or partner organisations.

Any future model, test or pilot will be designed around clearly identified client groups, needs or points in the client journey. Its development will consider partner readiness, data-sharing requirements, consent, safeguarding, governance, workforce impacts and operational deliverability. It will also assess the implications for Social Security Scotland's client services, including interaction length, staff capacity, operational performance and the systems needed to record referrals and monitor what happens after they are made.

Testing will assess whether a structured referral produces better outcomes than signposting alone. This will include whether people successfully reach the service to which they are referred, access additional entitlements, advice or other relevant support, and experience a more coordinated journey without additional burdens being placed on them or the organisations involved.

By the end of this phase, Ministers should have evidence on whether particular referral models are effective, affordable and sustainable, and which, if any, should progress to wider implementation.

Phase 3 - embedding proactive and joined-up support

Where evidence from Phase 2 demonstrates that a referral pathway improves outcomes and adds value, the final phase will focus on incorporating that pathway into routine delivery where this is feasible, affordable and appropriate.

This will involve moving from time-limited testing to an established operating model, with clear referral criteria, staff guidance, information-sharing processes, governance arrangements, accountability and agreed responsibilities for Social Security Scotland and participating partners. Monitoring should continue so that pathways can be improved, adapted or discontinued where they are not delivering the intended outcomes.

This work will align with Social Security Scotland's wider ambition to improve connections with other services and provide a more joined-up experience for clients. Referral pathways, enabled by lawful and effective information sharing, would provide a practical way of connecting people directly to relevant advice, entitlements and wider support. Their development will therefore be coordinated with Social Security Scotland's wider service, data and digital planning.

By the end of the Strategy period, successful referral pathways should form part of a more coordinated and preventative model of support. People who need more active help should experience a clear and reliable connection between services, rather than being given information and left to make the next contact alone. This should reduce reliance on informal or inconsistent local arrangements, give partners clearer roles and support the wider public service reform ambition of services that are easier to navigate and better organised around people's needs.

5.2 Pre-application support

This area of progression supports Social Security Scotland's Charter commitment to help people access social security in ways that meet their needs. Pre-application support is about what happens before someone submits an application: whether they know support exists, understand that they may be entitled to it, know how it might affect their existing entitlements, feel confident to apply, and can get help to take the next step. It means providing clear information, trusted advice or advocacy where needed, practical help with forms and evidence requirements, and routes into Social Security Scotland that are easy to find and use.

Income maximisation also remains a core element of Scotland's approach to eradicating child poverty. Strengthening links between social security, advice and advocacy services and wider support can help ensure families receive the full range of assistance available to them. Attention will be given to groups who are known to face higher poverty rates or additional costs, including disabled people, carers, minority ethnic communities and lone-parent families²⁴ and who may be entitled to more than one benefit or entitlement.

People should not have to become experts in the social security system to access the support they are entitled to. Too often understanding what support is available, whether someone may be eligible, and where to go for help can feel complex and overwhelming, with negative effects on mental health and wellbeing. For some people, support is only found after a crisis point, while others miss out altogether because they are unaware of their entitlements or do not know where to turn for trusted advice.

Our ambition is that people receive the right information, advice and support before they make an application, through services, organisations and relationships they already know and trust. Whether someone is becoming a parent, experiencing bereavement, facing financial hardship, living with ill health, leaving an abusive relationship, settling in Scotland as a refugee, or navigating another significant life event, support should be available at the point it is needed most. This is good for the individuals in question, as well as being good for Scottish society more broadly.

For those involved this should feel less like being passed between separate organisations and more like receiving coordinated support. Advice, advocacy and practical assistance may be provided by different organisations, but people should not need to understand those boundaries before they can get help. They should not need to know which organisation is responsible for which benefit, repeatedly tell their story, or navigate disconnected services on their own.

This area recognises that pre-application support extends beyond Social Security Scotland. Many people first seek help from welfare advisers, advocacy organisations, schools, family support services, local authorities, community groups and health professionals, such as midwives, health visitors and GPs. By strengthening these networks and improving the routes between them, we can make it easier for people to access devolved benefits, reserved benefits and wider income-maximisation support through channels they already trust.

24 Scottish Government (2026) [Building Hope, Building Futures: Tackling child poverty delivery plan 2026-2031](#)



Case study – Jay

The below highlights an illustrative example of a family like Mairi's trying to interact with different organisations to get the support they need and are entitled to.

Jay is Mairi's youngest child and was born with complex health needs.

Jay needs more care and supervision than other children his age. Mairi has reduced her hours at work because of appointments, broken sleep and the extra support Jay needs day-to-day.

She is tired but does not think of herself as a carer and is unsure whether there is any support available because she is still working. After speaking to Jay's nursery and health visitor, Mairi is put in touch with a local disabled people's organisation. They help her understand that support may be available for Jay, including Child Disability Payment, and that entitlement is about Jay's needs rather than Mairi's earnings. They also help her think through the kind of information that may help explain Jay's daily care, supervision and mobility needs as part of an application.

Mairi then contacts Social Security Scotland and is offered help through the Local Delivery service to understand the application process and what information may be needed. She also learns that independent advocacy support, including that provided by the free Social Security Independent Advocacy Service, can support disabled people or people applying for benefits on their behalf to understand information, express their views and take part in the process before, during and after applying for Social Security Scotland benefits.

Through this journey, Mairi begins to understand not only what Jay may be entitled to, but also wider help for the family, including income-related support and assistance for unpaid care and carers. Mairi is incredibly grateful for the support she has received but is also struggling with the burden of applications on top of everything else.

Commitment 2A: Coordinated pre-application support offer

Commitment: We will embed a more coordinated pre-application support offer across public services and partners, with clearer routes into Social Security Scotland through locally embedded engagement and third-party representative escalation.

Aim: Support should be easier to find, understand and access. People should experience coordinated services and smoother transitions between them, rather than having to navigate multiple organisations to reach the help they need. This means making routes clearer for both individuals and the trusted organisations, advisers and local services that support them, including where further help, clarification or escalation is needed from Social Security Scotland.

Contributes to outcomes: People know where and how to access the support they are entitled to; people access support without needing to navigate complex systems alone; people feel safe, respected and confident accessing support.

Phase 1 - maximising current support

People already access pre-application support in different ways. Social Security Scotland provides support through its Local Delivery service, client services and accessible application channels. Local Delivery can help people understand and complete applications, including through support in local communities. Separately, the Scottish Government funds the Social Security Independent Advocacy Service, which can provide free advocacy support to disabled people who may need help to understand information, express their views or take part effectively in the social security process and decisions that affect them. Many people also receive help before applying from welfare rights advisers, local authorities, carers centres, disabled people's organisations, health professionals, schools, family support services and other community led organisations.

This phase will focus on making those existing routes clearer and better connected. This is particularly important for people who may require additional support to access social security, including disabled people, people with non-standard communication needs, people whose first language is not English, people experiencing mental ill health, people facing digital exclusion, and people in rural or island communities where access to advice and services may be more limited.

Trusted local settings can provide important routes into pre-application support. Libraries, schools, community hubs, faith and belief organisations and other local facilities can provide familiar places where people hear about support, are signposted to advice, or are connected to existing social security resources. This matters where people may not approach statutory services directly, or where stigma, geography, challenges with internet access or other forms of digital exclusion, lack of anonymity or lack of confidence make it harder to ask for help.

Trusted organisations, advisers and intermediaries often also support people with complex circumstances before and during an application. In some cases, these organisations may need a clearer route into Social Security Scotland where standard

channels have not resolved an issue, or where further clarification is needed to support a client effectively. Social Security Scotland has tested a third-party escalation route for trusted representatives in these circumstances, and learning from that pilot is informing a more consistent approach for third sector organisations, welfare rights advisers and other trusted intermediaries to access support on behalf of clients.

By the end of this phase, we will have a clearer understanding of how current pre-application support can be made easier to find, easier to use and navigate and more consistent across Scotland. This learning will help identify what can be strengthened within existing arrangements, what requires further partnership or operational development, and what approaches may be suitable for testing in Phase 2.

Phase 1 activity will include:

- improving awareness of Social Security Scotland's Local Delivery service, so that people and the organisations supporting them are clearer about the help available before and during the application journey.
- improving awareness of the Social Security Independent Advocacy Service, so that disabled people and the people supporting them understand when advocacy may be available to help them communicate, how advocacy differs from other forms of pre-application support, and understand information or take part effectively in the social security process.
- rolling out a national third-party representative escalation route, informed by the pilot, to provide a more consistent and coordinated route for third sector organisations, welfare rights advisers and other trusted intermediaries to access support on behalf of clients with complex circumstances.
- exploring how Social Security Scotland can give greater prominence to independent advice services in client materials and communications, so that people are more consistently signposted to trusted pre-application support alongside agency services.
- continuing to ensure that all staff receive comprehensive and on-going training, enabling them to deliver high-quality, client-centred support that is responsive to individual needs, promotes independence, and ensures positive outcomes for those we support.

Phase 2 - testing and developing new approaches

Building on Phase 1, this phase will focus on developing more consistent and coordinated routes into pre-application support. The emphasis will move from clarifying and strengthening existing support to testing how those routes can work more effectively across Social Security Scotland, advice services, advocacy organisations and local support providers.

By this phase, work should be underway to evaluate and review the effectiveness and impact of the Social Security Independent Advocacy Service, currently delivered by Advice Direct Scotland. This will help us understand how advocacy supports disabled people to access devolved benefits and how learning from the service can inform wider

pre-application support and understanding of disabled people's needs across the pre-application landscape, particularly in terms of ensuring this is coherent.

The aim is to move from individual routes of support towards a more connected offer that reduces the number of 'wrong doors' and helps people reach the right help more quickly. This phase will use learning from Local Delivery, independent advocacy, third-party escalation, local partners and community routes to understand what works, what remains difficult for people, and where more coordinated approaches should be developed further.

Phase 3 - embedding proactive and joined-up support

In the longer term, pre-application support should become a routine part of the wider public service landscape. People should not need detailed knowledge of the social security system or rely on chance encounters with the right service. Instead, support should be embedded within trusted services and organisations, with clear and reliable routes into Social Security Scotland.

By this stage, the focus will be on embedding approaches that have been shown to improve access, confidence and coordination. This should mean that people can access support through trusted relationships and services that work together, understand their options earlier, and move more smoothly between information, advice, advocacy, practical help and Social Security Scotland where needed.

The long-term outcome should be a more coordinated pre-application support landscape, where people are less likely to miss out because they did not know where to turn, and where trusted organisations are better able to help people access the support they are entitled to.



Commitment 2B: Tailored support at key life events

Commitment: We will focus on pre-application support at key life events through strengthening partnerships with locally based groups, so that people get the right support at the right time through people they already know and trust.

Aim: Rather than relying on people to find support themselves, we want support to reach them at key moments in their lives, helping them access their entitlements earlier and more easily.

Contributes to outcomes: People get the right support at the right time; people understand their rights and know what support they are entitled to; people know where and how to access the support they are entitled to.

Phase 1 - maximising current support

This first phase focuses on identifying and strengthening opportunities to provide support at key life events. These are moments when someone's circumstances may change significantly, such as becoming a parent or carer, experiencing bereavement, receiving leave to remain, leaving an abusive relationship, leaving care, receiving a disability diagnosis, or moving through important education and family transitions.

Key life events can act as trigger points for benefit take-up. They can bring new costs, changes in income, new caring responsibilities, changes in health or family circumstances, or a need to access support for the first time. They can also be moments when people are already in contact with trusted services, creating an opportunity to provide information and support earlier, before financial pressure escalates.

Financial hardship, insecure housing, employment challenges and other social and economic factors can affect both financial wellbeing and mental health, as well as contribute to wider inequalities. People experiencing major life events may be more vulnerable to poverty, financial insecurity and poor wellbeing, particularly where several pressures happen at the same time. Taking a preventative and early intervention approach can therefore support benefit take-up and income maximisation, while also contributing to wider ambitions to improve health and wellbeing outcomes.

This phase will focus on making better use of existing contact points at key life events. We will work with trusted organisations and services, including registrars, health services, schools, refugee support services, domestic abuse support routes and bereavement organisations, to understand where information about social security and wider support can be provided more consistently and at the point it is most relevant.

This commitment is not about creating a new route for every life event. It is about identifying where existing services and relationships can be used more effectively to help people understand what support may be available, where to get advice, and how to take the next step. This will help reduce the risk of people missing out because they were unaware support existed and will provide evidence on which life event routes should be developed further in later phases.

Phase 1 activity will include:

- beginning work with National Records of Scotland (NRS) and local registrars to identify key life events where relevant benefit information could be provided more consistently and accessibly, including around births and deaths.
- working with maternity services, health visitors and relevant local partners to test how benefit information and wider pre-application support can be provided when planning for pregnancy, during pregnancy and around the arrival of a child, using trusted frontline routes to improve awareness of devolved entitlements and wider support. This will include a specific focus around the planned launch of the increased Scottish Child Payment for under ones during 2027-28.
- exploring with relevant partners how digital tools could identify and show combined entitlements at key life events, with a view to improving earlier access to devolved benefits, reserved benefits and wider support. This includes looking at current benefit calculators and scoping potential new digital tools.
- delivering communications activity raising awareness of Best Start Grant Pregnancy and Baby Payment, recognising the importance of reaching people early at the point where support can have the greatest immediate impact.
- building capacity within organisations providing support to people with mental health and wellbeing concerns by increasing understanding, awareness and ability to signpost to available entitlements.
- working with Scottish Refugee Council to engage with those with lived experience to identify opportunities to provide earlier information and support for newly recognised refugees at key life events for people seeking asylum so they can access their entitlements.
- working with trusted bereavement support organisations and frontline bereavement workers to ensure that information about Funeral Support Payment and related entitlements is available through support offered to bereaved families at the right time and in an appropriate way.
- ensuring that relevant benefit information is made available through the National Fund to Leave, so that women experiencing domestic abuse can access information about entitlements alongside the wider support available through that route.
- deliver tailored engagement activity aimed at people who may not identify themselves as carers, working with partners and community organisations to improve understanding of entitlement to Carer Support Payment and related support.
- building on existing engagement with schools and early learning settings to identify how trusted education and early years routes can provide earlier information and pre-application support to parents, carers and young people, including at key transition points such as early years, starting school and moving from school into work or training, where this could improve awareness of relevant entitlements, including Job Start Payment.

Phase 2 - testing and developing new approaches

Building on the learning from Phase 1, Phase 2 will focus on developing the approaches and partnerships that appear most likely to improve support at key life events. The emphasis will move from identifying opportunities to understanding which routes work best, for whom, and in what circumstances. We will work towards a more consistent model for providing support through trusted community routes and organisations that regularly support people during significant life changes.

As we develop these approaches, we will consider not only how they improve awareness of entitlements and access to financial support, but also how earlier intervention can contribute to wider wellbeing outcomes. Many of the life events that increase the likelihood of financial hardship can also place additional pressure on mental and physical health and wellbeing or exacerbate existing ill health. This phase will therefore help us understand how timely information, signposting and practical support can reduce stress, improve financial resilience and support people during periods of change.

This will help ensure people are more likely to receive timely information and support regardless of where they live or which trusted service they engage with. By the end of this phase, we will have a stronger understanding of which key life event routes should be embedded more consistently, what trusted professionals and organisations need to provide information confidently, and where further partnership, guidance or digital support may be required.

Phase 3 - embedding proactive and joined-up support

In the longer term, providing social security information within the pre-application support landscape should become a routine part of the support people receive during key life events. Effective approaches developed and tested through earlier phases will be embedded across relevant services and communities, so that support is more consistently available through trusted relationships and settings.

By this stage, we want support to be viewed as part of a broader preventative approach that recognises the links between financial security, social circumstances, and mental and physical health and wellbeing. Improving access to entitlements can play an important role in reducing the pressures associated with poverty, debt, insecure housing and other factors that can negatively affect wellbeing. Connecting people to support earlier can therefore contribute to financial resilience and help reduce the likelihood that difficulties escalate into more significant challenges.

This should mean that people can access relevant information and support at the right time and in the right place, without needing detailed knowledge of the social security system. Support should feel like a natural part of the wider help available during important moments in people's lives, helping them understand their options, access their entitlements earlier and connect to wider services where appropriate.

Commitment 2C: Joined-up advice and income maximisation support

Commitment: We will streamline support to learn about and apply for devolved benefits, reserved benefits and wider income maximisation support through strengthened partnerships with Social Security Scotland, advocacy services, welfare rights advisers, community link workers and wider public and third sector support.

Aim: This commitment is about helping people access the full range of support available to them, rather than a single benefit or service. Many people who are missing out on support are already in contact with trusted advisers, local services and community organisations. By strengthening these connections, we can help identify need earlier and make it easier for people to access the support they are entitled to.

Contributes to outcomes: People access support without needing to navigate complex systems alone; people get the right support at the right time; people know where and how to access the support they are entitled to.

Phase 1 - maximising current support

This phase focuses on strengthening links between devolved, reserved, advice, advocacy and wider income maximisation support. The aim is to help people access their wider entitlement package, not only a single benefit or service. This is particularly important where entitlement to a reserved benefit acts as a gateway to Scottish Government benefits, local authority support or other forms of financial assistance.

For many people, Universal Credit is one of the clearest examples of this gateway role. As one of the principal means-tested benefits within the UK social security system, entitlement to Universal Credit can help unlock access to a wider package of support that contributes to income maximisation and financial wellbeing. This can include:

- Scottish Child Payment;
- Best Start Grant Payments, including Pregnancy and Baby Payment, Early Learning Payment and School Age Payment;
- Best Start Foods;
- Funeral Support Payment;
- Council Tax Reduction;
- Free School Meals;
- School Clothing Grants;
- Discretionary Housing Payments; and
- Scottish Welfare Fund support in certain circumstances.

This means that someone missing out on a reserved benefit may also miss out on linked Scottish, local authority or wider support. When someone is identified through one part of the system, there may be an opportunity to connect them to other entitlements, advice or income maximisation support. Phase 1 will therefore focus on making better use of existing points of contact across services, including crisis support like the Scottish Welfare Fund, health and family settings, DWP interactions, advocacy, welfare rights advice, money and debt advice, and wider Scottish Government programmes.

The Scottish Government funded Social Security Independent Advocacy Service is also an important source of learning in this phase. The service supports disabled people to understand information, express their views and take part in social security processes. It can also provide insight from performance, referral, signposting and lived experience data, helping improve understanding of barriers faced by disabled people and seldom-heard groups when accessing social security.

This phase will also connect benefit take-up activity with wider Scottish Government programmes focused on family support, advice and early intervention. This includes work to develop the Whole Family Support Integrated Programme from April 2027, alongside wider funded activity such as the Whole Family Support Third Sector Delivery Fund and the Advice in Accessible Settings Fund. These programmes provide opportunities to understand where social security, advice and income maximisation support can be better connected to services families already use.

This work will not make Social Security Scotland responsible for delivering independent income maximisation or welfare rights advice. Rather, it will strengthen the routes between social security, advice, advocacy and wider support, so that people are more likely to reach the right help through the services they already use and realising a 'no wrong door' approach in practice.

By the end of this phase, we will have a clearer understanding of where existing advice, advocacy and income maximisation routes can be better connected, where people are most likely to miss out on linked support, and where stronger partnership working could have the greatest impact.

Phase 1 activity will include:

- working with local authorities administering the Scottish Welfare Fund, and with wider cash-first and crisis support partners, to strengthen how people accessing crisis support are identified, informed about and connected to devolved benefits, reserved benefits and wider income maximisation support.
- working with health, childcare and family support services to identify opportunities to strengthen routes into advice and support to apply for social security through trusted local settings, helping people access devolved benefits, reserved benefits and wider income maximisation support earlier.
- building on existing engagement between Social Security Scotland and the Department for Work and Pensions to strengthen awareness of devolved benefits during interactions relating to reserved benefits, particularly where reserved entitlements act as gateways to additional support.
- working with the Social Security Independent Advocacy Service to improve awareness of relevant devolved and reserved entitlements, including using service data insight to better understand the barriers experienced by disabled people and others who need advocacy support to access their entitlements.
- working with Social Security Scotland, welfare rights advisers, money and debt advisers and other frontline specialist advisers to understand how devolved benefits, reserved benefits and wider income maximisation support can be better joined up in practice. This will draw on existing stakeholder networks, including the Benefit Take-Up Stakeholder Reference Group, to identify practical improvements to signposting, escalation routes, guidance and partnership working.
- working collaboratively across the Scottish Government, including with areas responsible for the design and implementation of the Whole Family Support Integrated Programme from April 2027, and with wider funded programmes such as the Whole Family Support Third Sector Delivery Fund and the Advice in Accessible Settings Fund. This will help identify opportunities to embed social security support within existing services, strengthen routes into advice and income maximisation support, and address gaps in benefit take-up.

Phase 2 - testing and developing new approaches

Building on the stronger links developed in Phase 1, this phase will focus on developing more consistent approaches to joined-up advice and income maximisation support. The emphasis will move from understanding where connections already exist to testing how social security, advice services, advocacy, local authorities, DWP and wider support can work together more effectively in practice.

This will include strengthening referral routes and testing more integrated models that bring together devolved benefits, reserved benefits, local authority support and wider income maximisation services. The aim is to help people access their wider entitlement package, particularly where entitlement to a reserved benefit such as Universal Credit or Pension Credit may act as a gateway to other forms of support.

This will help identify what works, where capacity or delivery pressures remain, and what guidance, referral arrangements, data, governance or partnership structures may be needed to support more consistent income maximisation approaches.

By the end of this phase, we will have a stronger understanding of which approaches are most effective in helping people identify and access wider financial support, and which should be embedded more consistently in Phase 3.

Phase 3 - embedding proactive and joined-up support

In the longer term, a more coherent advice and income maximisation landscape should reduce disconnection between devolved benefits, reserved benefits, local authority support and wider services. Effective approaches developed through earlier phases should be embedded more widely, so that people are better supported to access their full entitlement package rather than a single benefit or service.

By this stage, trusted advisers and services should be better able to identify when someone may be missing out on support and connect them to the right advice, advocacy or income maximisation route. People should not need to understand the difference between devolved and reserved benefits, advocacy and advice, or local and national support before they can get help.

The long-term outcome should be a system that is organised around people's circumstances rather than organisational boundaries. People should experience coordinated support that helps them access the full range of assistance available to them, maximise their income and receive help through whichever trusted route they first engage with.

5.3 Awareness raising, outreach and engagement

The approach taken in this area of progression reflects Social Security Scotland's Charter commitments to involve people in shaping services, provide accessible information and ensure services are responsive to the diverse experiences of people across Scotland.

The overall aim is to make awareness raising, engagement and outreach more responsive to people's circumstances, more effective at reaching those at risk of missing out, and more closely connected to the trusted services and community organisations that people already rely on.

For clients, these changes should mean that information about entitlements is easier to find, easier to understand and more likely to reach them at the point when it is most relevant. Rather than expecting individuals to identify support for themselves, we will increasingly use evidence, insight and partnership working to reach people proactively through the places, professionals and organisations they already know and trust.

We also recognise that how social security is communicated about is as important as where it is promoted. People should see messages that are accessible, respectful, culturally competent and free from stigma, helping them to understand that social security is an entitlement and a source of support they have a right to access. This is

particularly important for groups who may face additional barriers because of being disabled, language, culture, caring responsibilities, rurality or poverty. Respectful and supportive narratives about social security should be encouraged at every level of public services and public life.

Ultimately, clients should experience relevant and tailored outreach, messaging and information about entitlements, services and support. This activity should be informed by evidence of who is least likely to access support, delivered through trusted local routes and campaigns that help people understand their eligibility for both devolved and reserved entitlements, as well as where to access support or further information.



Case study – Abdul, Morag and Zain

The illustrative example below highlights the benefits of engaging directly with groups in the community.

Abdul (68) and Morag (59) are Mairi’s parents, living nearby in a small rural community with Mairi’s youngest brother Zain.

Abdul and Morag help Mairi with childcare, but as they are getting older the family increasingly helps them too. Public transport is limited, mobile signal and internet connection is unreliable, and the nearest advice service is not easy to reach. Abdul has reached State Pension age and develops care needs because of a long-term health condition. He receives Pension Age Disability Payment but is not aware of other forms of support that might be available.

Abdul and his 18-year-old son, Zain, go to their local mosque regularly. On one occasion there is a session being delivered by Social Security Scotland. This session is providing information on recognising unpaid care.

Zain has started helping his parents more, taking Abdul to appointments, collecting his prescriptions and helping him take his medicines as well as helping Morag understand letters. Through the session delivered by Social Security Scotland Zain has become far more aware of benefit eligibility and successfully applies for Young Carer Grant. Zain was speaking to his friend Adil about the session, Adil said that nothing like that has ever happened at his mosque – but he felt there would be a lot of people from his community who would benefit from this kind of information and support in understanding the application forms.

Commitment 3A: Data-driven and impactful engagement

Commitment: We will embed the systematic use of data and insight across services to identify and prioritise individuals and groups most at risk of not taking up their entitlements, ensuring awareness and outreach activity is tailored and evidence-led across devolved and reserved benefits.

Aim: Ensuring awareness raising, engagement and outreach activity is informed by evidence about who is missing out on support, where barriers are greatest and which approaches are most effective. By combining data, local intelligence, stakeholder insight and lived experience, we can tailor activity where it is most likely to improve take-up.

Contributes to outcomes: People understand their rights and know what support they are entitled to; people get the right support at the right time; people know where and how to access the support they are entitled to.

Phase 1 - maximising current support

This first phase will focus on making awareness and outreach activity more evidence led. The aim is to use existing data, local intelligence, client insight, stakeholder knowledge and lived experience to understand who may be missing out, where barriers are greatest, and which routes are most likely to reach people effectively.

Awareness of social security support is not consistent across all communities. Some minority ethnic communities, particularly where English is not a first language, may have less contact with traditional information channels or be less likely to engage with services that usually promote support. Previous engagement through schools with high numbers of pupils who speak English as an additional language, and targeted outreach through Glasgow Central Mosque, demonstrated the value of working through trusted community settings.

This phase will therefore focus on strengthening how insight from seldom-heard groups, community representatives and local partners is used in engagement planning. This includes working with organisations representing minority ethnic communities, faith and belief groups, rural and island communities and other seldom-heard groups to understand barriers, identify trusted routes, and tailor awareness activity where generic communications may be less effective.

We also recognise the importance of reaching families at the earliest possible opportunity.

We have committed to increasing Scottish Child Payment to £40 per week for eligible families²⁵ with children under one during 2027-28. While take-up rates remain high overall, evidence suggests that take-up among families with children under one is lower than for older children. Although this is often linked to delays in receiving a qualifying benefit, it highlights the importance of providing information and support as early as possible through routes such as maternity services, midwives, health visitors and other trusted partners.

25 Scottish Government (2026) [Scottish Child Payment](#)

By the end of this phase, we will have a clearer understanding of where awareness and outreach activity should be prioritised, which groups and places may need more tailored approaches, and how trusted organisations, services and community settings can help people receive information that is relevant, accessible and easier to act on.

Phase 1 activity will include:

- developing a prioritisation approach for awareness and outreach activity by Social Security Scotland using available take-up rates, local intelligence, client survey evidence, applicant diversity data, stakeholder insight and wider evidence of where barriers to access are most pronounced, so that engagement is tailored to the groups and places where it is most likely to improve take-up.
- strengthening the use of stakeholder and local intelligence in engagement planning, including through the Benefit Take-Up Stakeholder Reference Group and direct engagement with organisations representing seldom-heard groups, so that outreach activity is informed by current local barriers, trusted routes and community insight.
- working with island stakeholders, including the Scottish Islands Federation, Young Islanders Network, community groups and council officers, to strengthen awareness and signposting approaches that reflect island circumstances.
- working with local partners across Scotland, with a particular focus on rural and island communities, to explore the use of trusted community venues, including libraries, schools, community hubs and other local facilities, as routes into support.
- expanding engagement with national and local faith and belief organisations through the Faith and Belief Representative Group. This will help us explore opportunities to signpost faith and belief organisations to existing benefit take-up resources and advice services to enable informed referrals through trusted community networks.
- using place-based evidence, including the Scottish Islands Survey and local intelligence from island stakeholders, to understand where data, local insight and trusted routes into support could help identify unmet need and improve take-up.
- developing our communications and engagement with schools and early years providers to help ensure we are providing clear information to parents and carers on the range of devolved entitlements available in Scotland, including where awareness of reserved gateway benefits is important to accessing that support.
- delivering tailored awareness activity to improve take-up of Funeral Support Payment and Job Start Payment, using evidence and stakeholder insight to reach eligible groups through the channels and services most relevant to them.

Phase 2 - testing and developing new approaches

Building on the prioritisation approach and trusted engagement routes developed in Phase 1, this phase will focus on testing which outreach approaches are most effective for different groups, places and benefits. The emphasis will move from identifying where tailored engagement is needed to understanding what works in practice, including which channels, settings, messages and partnerships are most effective in reaching people at risk of missing out.

This will include reviewing the impact of awareness and outreach activity delivered during Phase 1, including activity with seldom-heard groups, rural and island communities, faith and belief organisations, schools, early years providers and partners supporting families with young children. We will use this learning to refine engagement activity, improve the tailoring of messages and make better decisions about where resources can have the greatest impact.

We will also continue to strengthen two-way relationships with community organisations, faith and belief groups, island and rural stakeholders, and organisations representing seldom-heard groups. This will help ensure outreach activity is not only delivered through trusted routes, but also informed by current community insight, emerging barriers and lived experience.

By the end of this phase, we will have a stronger understanding of which engagement approaches are most effective in reaching different communities, what support trusted partners need to share information confidently, and how evidence and local insight can be used more consistently to shape future awareness and outreach activity.

Phase 3 - embedding proactive and joined-up support

In the final phase, the focus will be on embedding an evidence-led approach to awareness and outreach activity as a routine part of benefit take-up delivery. By this stage, data, local intelligence, stakeholder insight, lived experience and evaluation findings should be used more consistently to identify where unmet need remains and where targeted activity can have the greatest impact.

The learning from earlier phases will be used to strengthen how awareness and outreach activity is planned, delivered and evaluated. Successful approaches should be adopted more consistently across future activity, helping ensure that engagement remains responsive to changing needs, emerging evidence and local circumstances.

The relationships developed with community organisations, faith and belief groups, island and rural stakeholders and organisations representing seldom-heard communities should become an established part of how awareness and outreach activity is shaped. This will help ensure that engagement is not only delivered through trusted routes but also informed by the communities it is intended to reach.

By the end of the Strategy period, awareness and outreach activity should be more targeted, more responsive and more effective at helping people understand their entitlements. People most at risk of missing out should be more likely to receive clear, relevant and accessible information through the channels, services and organisations they are most likely to trust.

Commitment 3B: Culturally competent and stigma-free messaging

Commitment: We will deliver consistent, culturally competent and stigma-free messaging across public-facing services, co-designed with people and communities, to improve understanding of entitlements and confidence in accessing support.

Aim: This commitment focuses on ensuring that information about social security is accessible, inclusive and grounded in people's experiences. Effective communication is not only about providing information but helping people understand their rights, feel confident accessing support and do so without fear of stigma or judgement.

Contributes to outcomes: People feel safe, respected and confident accessing support; people understand their rights and know what support they are entitled to; people know where and how to access the support they are entitled to.

Phase 1 - maximising current support

Social Security Scotland has already begun strengthening its equality and inclusion evidence base and using this insight to improve services and client experiences. This includes developing a better understanding of the needs and experiences of diverse communities, using data and evaluation activity to identify inequalities in access and outcomes, and applying this evidence to service improvement.

Social Security Scotland's tackling stigma activity has also provided important learning on how messages can promote social security as a right, challenge negative perceptions and normalise accessing support.

Phase 1 will focus on applying that learning more consistently to public-facing communications, staff capability and engagement activity. The aim is to ensure information about social security is clear, accessible, respectful and less likely to reinforce stigma, while supporting staff to communicate in ways that respond to different needs and circumstances.

Communication activity in this phase will therefore help normalise social security as a right, challenge negative assumptions, and give people confidence to access support when they need it.

This will build on existing work around trauma-informed practice, inclusive communication, accessibility, mental health awareness, tackling stigma campaigns and message testing. It will also consider how people may experience information differently because of language, culture, disability, literacy, digital access, geography, caring responsibilities or previous experiences of public services.

Accessible communication should be planned from the outset, rather than treated as an add-on. This includes giving appropriate consideration to formats such as Easy Read, BSL, large print, audio and video, alongside other communication needs identified through user research, lived experience and stakeholder insight.

The actions in this phase will strengthen the foundations for culturally competent and stigma-free messaging. They will help staff communicate with confidence, support improvements to public-facing materials, and provide opportunities to test and refine messages with people and organisations who understand the barriers to take-up. Communications should reflect the diversity of Scotland's communities, including island and remote communities, and be delivered through channels that people are most likely to access and trust.

By the end of this phase, information should be easier to understand, more relevant to different audiences and less likely to discourage people from accessing support. This will help people recognise social security as a right, reduce the impact of stigma on take-up, and give Social Security Scotland and partners stronger evidence about which language, formats and approaches work best for different groups.

Phase 1 activity will include:

- rolling out the trauma-informed training pilot and wider trauma-informed approach across Social Security Scotland, so that staff are better equipped to communicate in ways that reduce re-traumatisation and stigma.
- strengthening Social Security Scotland's staff capability on inclusive communication, cultural competence and unconscious bias, drawing on external expertise where appropriate, so that public-facing support is more responsive to the needs of diverse communities.
- ensuring Social Security Scotland staff are equipped with the skills to respond to people in distress, the ability to recognise signs of poor mental health and suicidality and the confidence to respond appropriately, and signpost to sources of support.
- ensuring engagement approaches recognise cultural and faith-based considerations and support culturally competent messaging.
- reviewing priority public-facing communications and materials to identify where language, framing or format may reinforce stigma or reduce accessibility, and updating these in line with stigma-free and culturally competent practice.
- testing and refining key messages and communications products with people with lived experience and with organisations representing seldom-heard groups, so that public-facing messaging is better informed by the experiences of those most likely to face barriers to take-up.
- ensuring that new 'how to apply' videos and related guidance materials are developed to clear accessibility standards, with accessible formats considered from the outset. This should include appropriate consideration of Easy Read, BSL, large print, audio, video and translated materials, where these would support a more inclusive and accessible client experience.

Phase 2 - testing and developing new approaches

Building on the learning from Phase 1, this phase will focus on testing and refining messages, communications products and staff practices to understand what works best for different audiences. We will use feedback from people with lived experience, seldom-heard groups and delivery partners to improve how social security is communicated about and to ensure messages are accessible, respectful and less likely to reinforce stigma.

The emphasis will move from improving existing materials and training to testing how different messages, formats and channels affect people's understanding, confidence and willingness to engage. This will include expanding the use of message testing and co-design, particularly with people and communities who face the greatest barriers to take-up.

We will also review the impact of training on staff confidence and capability, using learning to strengthen communication practices across frontline services. This will help us understand where staff feel better equipped to communicate in trauma-informed, culturally competent and stigma-free ways, and where further support or guidance may be needed.

This should help people experience accessible, respectful and relevant communications regardless of how they engage with the system. Whether they see a campaign, speak to a member of staff or receive information from a partner organisation, they should encounter language and messages that reflect their needs and circumstances.

By the end of this phase, we will have stronger evidence about which messages, formats, channels and staff practices are most effective in helping people understand their rights, recognise themselves as potentially eligible for support and feel more confident accessing social security.

Phase 3 - embedding proactive and joined-up support

In this phase, we will embed trauma-informed, culturally competent and stigma-free communication as central part of service design, delivery and engagement. We will ensure that the approaches developed and tested through earlier phases are routinely applied across campaigns, communications products, frontline interactions and partnership activity.

We will continue to use lived experience, equality evidence and stakeholder insight to review and improve communications, ensuring they remain accessible, relevant and responsive to Scotland's diverse communities. We will maintain processes for testing messages, monitoring accessibility and identifying opportunities to improve how information is communicated across the system.

Commitment 3C: Strategic communications and engagement on entitlements and support, including reserved benefits

Commitment: We will deliver a coordinated programme of communications, engagement and awareness-raising activity to improve understanding of all benefits and local forms of support, helping people access their entitlements, maximise household incomes and receive the right information at the right time.

Aim: To help people understand the support available to them and how different forms of assistance can work together. It recognises that effective communications and engagement are not solely about raising awareness of individual benefits, but also about helping people understand their wider entitlements and connecting them to advice, support services and income-maximisation opportunities.

Contributes to outcomes: People understand their rights and know what support they are entitled to; people know where and how to access the support they are entitled to; people get the right support at the right time.

Phase 1 - maximising current support

While previous strategies have focused primarily on promoting the take-up of devolved benefits, this Strategy recognises the close interdependencies between devolved and reserved elements of the social security system. In many cases, entitlement to reserved benefits is a prerequisite for accessing support delivered by the Scottish Government. The communications and engagement activity delivered through this commitment will reflect a range of objectives and audiences. Some activity will focus on specific benefits, cohorts or life events where evidence suggests targeted action can improve take-up, while other activity will seek to increase awareness and understanding of the wider system of support available across Scotland.

Universal Credit is often the first point of contact individuals have with the social security system and acts as a gateway not only to devolved Scottish benefits, but also to a wider range of financial assistance and services. Entitlement to Universal Credit can unlock access to Scottish benefits and support eligibility for a range of local authority-administered schemes. As a result, improving awareness and take-up of Universal Credit can deliver benefits beyond the award itself, helping individuals and families access a broader package of support and reducing the risk of missing out on assistance to which they are entitled.

We also recognise the importance of increasing awareness of the Universal Credit Scottish Choices. Introduced in October 2017 through powers devolved under the Scotland Act 2016, Scottish choices give Universal Credit recipients the option of receiving payments more frequently than the standard monthly schedule and/or having the housing element of their award paid directly to their landlord. Evaluation of the policy by the Scottish Government found that it has been positively received by those who use it. However, the evaluation also highlighted the need for greater awareness and improved signposting of these options.

As a result, this phase focuses on improving awareness of both devolved and reserved benefits, particularly among those most at risk of missing out. We will use trusted routes such as schools, early years services, maternity services and community organisations to reach people with information that is relevant to their circumstances. This will also include raising awareness of free services and support available to help people in Scotland understand their eligibility for entitlements and to apply for these. No one should be paying to seek help to understand and apply for benefits and other entitlements.

This should mean people should find it easier to identify entitlements that they may be eligible for, and to become more aware of the wider range of help available to their household, rather than only learning about individual Scottish benefits in isolation.

Phase 1 activity will include:

- delivering a national parental employability and financial support campaign in 2026/27 to help families access available support. This will include locally targeted and tailored signposting to information, advice and support to apply for benefits they are entitled to, including reserved benefits such as Universal Credit.
- a strand of this activity will focus on maximising the take-up of support with childcare costs, including the Universal Credit Childcare Element and Tax-Free Childcare. We will use this as an initial test case for how awareness of reserved benefits can improve wider household income maximisation and access to benefits in Scotland.
- engaging with UK Government to raise concerns around the low take-up of childcare support in Scotland and discuss how current arrangements may be preventing access to childcare with a view to identifying opportunities for improvement.
- improving awareness of free, independent advice and income maximisation support available in Scotland, using this as an initial route to strengthen how people are connected to specialist support on both reserved and devolved benefits over time.
- working with the Department for Work and Pensions to ensure that work coaches consistently promote Universal Credit Scottish Choices and help clients understand the options available to them.
- using the lessons learned from the previous tackling stigma campaign to strengthen future action, ensuring that our messaging is better able to reduce stigma, build trust and improve take-up among those most likely to miss out.
- developing tailored communications approaches for island communities, working with local media, community newsletters, local radio and trusted community networks to improve awareness of entitlements and support services.
- continuing to build and create relationships with trusted organisations, community groups and partner networks to improve the reach of information about devolved entitlements, reserved gateway benefits and wider support, ensuring it reaches people through services and settings they already know and trust.

Phase 2 - testing and developing new approaches

Building on Phase 1 activity, this phase will focus on testing which messages, channels and settings are most effective in helping people understand their wider entitlements across devolved, reserved and local support. The emphasis will move from delivering targeted communications activity to understanding which approaches help people take action, including checking eligibility, seeking free advice or applying for support.

This should support a move beyond raising awareness of individual benefits in isolation, towards providing a more connected understanding of the wider support system. It will include learning from the activity on reserved gateway benefits in phase one, childcare costs support, Universal Credit Scottish Choices, free independent advice, island communications and wider income maximisation routes.

As part of this work, we will continue to engage with stakeholders, including third sector organisations, to explore how information about benefits and social security can be communicated accurately and constructively. This will include considering how responsible reporting and public discussion of benefits can be encouraged, recognising that wider narratives can influence stigma, perceptions of entitlement and confidence in accessing support.

We do not have control over how social security is discussed across the media or wider public debate. However, we can ensure we continue to work with third sector partners, disabled people's organisations and people with lived experience to support and amplify accurate, responsible and stigma-free communication about social security and the people who access it. This will include exploring how lived experience, evidence and good practice can inform wider public discussion, challenge harmful stereotypes and reinforce social security as a right and a public service that any of us may need.

By the end of this phase, we will have a clearer understanding of which communications approaches are most effective in helping people understand the wider package of support available to them, where they can access free advice, and how devolved, reserved and local entitlements can work together to improve household incomes.

Phase 3 - embedding proactive and joined-up support

In the longer term, communication, engagement and awareness activity should form part of a wider support system that helps people understand and access the full range of assistance available to them. By this stage, learning from earlier phases should be used to embed approaches that are most effective in helping people understand how devolved, reserved and local support can work together.

The focus will continue to include promoting Scottish benefits clearly and effectively, while also providing information that helps people recognise wider sources of support, including reserved benefits, local authority assistance, free independent advice and income maximisation services. Communications will help people understand what action they can take next, whether that is checking eligibility, seeking advice, applying for support or asking a trusted organisation for help.

By the end of the Strategy period, strategic communications and engagement should be tailored, more connected to practical routes into support, and better able to help people understand the wider package of assistance available to them. This should mean people are more likely to receive clear, timely and relevant information that helps them maximise their income and access the support they are entitled to.

5.4 Accessible processes and automation

The ambitions set out in this section support the Charter commitment to design services with the people who use them and to ensure processes are accessible, straightforward and responsive to individual needs.

People are more likely to access the support they are entitled to when the system is straightforward, easy to navigate and designed around their needs. However, for some clients, the journey into support can involve complex processes. This can make applying for support feel burdensome and can discourage people from engaging with the system altogether.

Improving accessibility, reducing administrative burden and making better use of information have significant potential to improve people's experience of the social security system and support higher levels of benefit take-up. However, these are also some of the most complex areas of system change. Many opportunities depend on digital capability, operational redesign, legislative considerations, data-sharing arrangements and partnership working across organisational boundaries. As a result, meaningful progress will require additional investment, a longer-term approach and will be subject to feasibility.

This Strategy therefore focuses on laying the foundations for future change. Over the lifetime of this Strategy, our priority will be to build the evidence base, undertake exploratory and discovery work, identify where opportunities for improvement exist, and test approaches that could reduce complexity and improve client experience. This will help us better understand what is operationally feasible, where changes are likely to have the greatest impact, and what barriers need to be addressed before more significant reforms can be implemented.

Over time, we want to move towards a system that makes better use of information already provided, reduces duplication and enables people to access support more easily. We also see opportunities to further explore how existing entitlement data could help streamline access to other forms of support, including devolved benefits, local authority services and wider entitlements where eligibility criteria align. While this Strategy will begin that exploration, the work and investment required is substantial and will take time to develop, test and evaluate.

Our long-term ambition remains a social security system that feels simpler, more connected and less burdensome to use. People should spend less time navigating processes, repeating information or trying to understand complex eligibility rules, and more time receiving the support they are entitled to. This Strategy represents an important first step towards that ambition by establishing the foundations upon which future transformation can be built.

Commitment 4A: Simplified and accessible processes

Commitment: We will strengthen our understanding of the barriers people experience when accessing and applying for social security and identify opportunities to make processes simpler, more accessible and more person-centred over time.

Aim: People should be able to access support through processes that are clear, accessible and designed around their needs. We will work to better understand where complexity can be reduced, where communications can be improved and where people face unnecessary barriers when engaging with the social security system and progressing through their client journey, from application to award and beyond.

Contributes to outcomes: People experience a faster, simpler and more predictable application journey; people feel safe, respected and confident accessing support; people access support without needing to navigate complex systems alone.

Phase 1 - maximising current support

Social Security Scotland has already undertaken a range of work to improve the client experience, including introducing accessible application channels, embedding person-centred approaches and simplifying aspects of client communications. For example, recent work to reduce the length and complexity of Adult Disability Payment decision letters has demonstrated the benefits that clearer and more accessible communications can have for clients and stakeholders.

This phase focuses on building a more comprehensive understanding of where people continue to experience complexity, uncertainty or barriers when accessing and receiving support. This will include review client journeys, communications, guidance and support routes to identify where processes could be made simpler and more accessible, while continuing to draw on operational learning, stakeholder engagement and lived experience.

Particular attention will be given to the experiences of people who may face additional barriers when interacting with services, including disabled people, people with non-standard communication needs, neurodivergent people, those experiencing digital exclusion and individuals from seldom-heard groups. This work will help develop a stronger evidence base on where improvements could deliver the greatest benefits and inform future service design and simplification activity.

Accessibility will be embedded across all routes into support, including digital, telephone, paper-based and face-to-face channels, so that people with different communication, sensory, cognitive, mental health and mobility needs can access information and support in a way that works for them.

For people accessing support, the benefits of this work are likely to be incremental during this phase. However, it will establish the foundations for a longer-term programme of improvement by identifying where the greatest barriers exist and where future changes could have the most significant impact on the client experience.

Phase 1 activity will include:

- reviewing evidence from Social Security Scotland operations, stakeholder engagement and lived experience to identify the stages of the client journey where people experience the greatest complexity, uncertainty or barriers to accessing support.
- exploring opportunities to improve the accessibility, clarity and usability of application forms, guidance, decision letters and other client communications, building on learning from previous service improvements.
- exploring how signposting and support can be better integrated and automated throughout the client journey, including within applications, award communications, reviews and challenge processes.
- using the evidence gathered through this work to identify and prioritise opportunities for future process simplification and service improvement activity.

Phase 2 - testing and developing new approaches

Building on the evidence and learning gathered during Phase 1, the second phase will focus on developing and testing priority opportunities to make social security processes simpler, clearer and more accessible in practice. We will continue to work with clients, stakeholders and delivery partners to assess potential approaches and understand which changes are most likely to improve accessibility, reduce complexity and support increased take-up.

This phase will strengthen the evidence base required to support future service improvements, while helping identify any operational, digital or legislative considerations that may need to be addressed. Where appropriate, this could include testing changes to application forms, guidance, letters, supporting information requirements, signposting, review processes or other parts of the client journey where evidence shows people experience particular difficulty.

Any testing will consider whether changes improve client understanding, reduce avoidable burden and work effectively across digital, telephone, paper-based and face-to-face routes. It will also consider operational impact, staff guidance, accessibility requirements and whether changes can be delivered safely and consistently.

By the end of this phase, we will have a stronger understanding of which process improvements are most likely to improve people's experience, which can be made within existing systems, and which may require further operational, digital or legislative development.

Phase 3 - embedding proactive and joined-up support

The final phase will focus on bringing together the evidence, learning and insight developed throughout the Strategy period to inform a longer-term approach to service simplification and accessibility. By this stage, we expect to have a clearer understanding of where people experience the greatest process barriers, which improvements have the greatest potential to improve client experience, and what changes may be required to support future implementation.

This learning will help shape future priorities and support the development of a more detailed programme of activity in the next Benefit Take-Up Strategy 2031-36. The work undertaken during this Strategy period will therefore act as a foundation for longer-term improvements that help create a social security system that is simpler, easier to understand and better designed around people's needs.

Over time, our ambition remains that people experience services that are straightforward, accessible and easy to navigate, regardless of how they choose to engage. By continuing to design services around lived experience, accessibility evidence and operational learning, we can help ensure future improvements support a more inclusive, person-centred and joined-up system of support.

Commitment 4B: Automation and simplified access through existing entitlements

Commitment: We will explore and expand opportunities to use existing entitlement information and digital capabilities to simplify access to support, reduce unnecessary applications and enable greater automation across devolved benefits where eligibility criteria align.

Aim: This commitment focuses on making better use of existing information and entitlement data to reduce the effort required to access support. Building on learning from existing automated processes within the Scottish social security system, we will identify opportunities to streamline client journeys, reduce avoidable administration to create efficiencies and explore where automation could be used to connect people to additional support.

Contributes to outcomes: People experience a faster, simpler and more predictable application journey; people access support without needing to navigate complex systems alone; people get the right support at the right time.

Phase 1 - maximising current support

Social Security Scotland has already demonstrated the benefits that can be achieved through automation and linked-entitlement processes, particularly within the Five Family Payments. This can mean using information from an existing application or award to identify entitlement to another payment with similar or linked eligibility criteria, reducing the need for separate applications or repeated evidence. For example, eligible families receiving Scottish Child Payment can be automatically awarded Best Start Grant Early Learning Payment and School Age Payment where the relevant criteria are met.

These approaches have helped reduce the need for multiple applications, improved the client experience and supported higher levels of take-up by making access to support simpler and more straightforward. In addition, they offer opportunities to create a more efficient and streamlined system, making greater use of existing entitlement information to reduce administrative burden, avoiding unnecessary manual intervention and streamlining service delivery. All while retaining appropriate oversight, safeguards and confidence in decision-making processes.

This phase focuses on building on that learning and establishing a clearer understanding of where similar opportunities may exist across the wider devolved social security system – including for carer and disability benefits. Our priority will be to identify benefits and entitlements where eligibility overlaps, understand the technical, operational and legislative changes and assess where automation could reduce barriers to accessing support. We will develop a stronger understanding of where appropriate automation can deliver the greatest benefits for individuals and the social security system, where additional safeguards or system changes may be required and which opportunities should be prioritised for future development.

Automation and linked-entitlement approaches will be designed with appropriate safeguards, transparency and choice. This is particularly important for disabled people and others who may be disproportionately affected if data is incomplete, inaccurate or does not fully reflect their circumstances.

For people accessing support, this work should begin to reduce administrative burdens and create a foundation for a system that is increasingly organised around established entitlement rather than repeated applications. Over time, this has the potential to make accessing support simpler, faster and more intuitive, while supporting wider public service reform objectives through better use of data, more joined-up services and a stronger focus on prevention.

Phase 1 activity will include:

- considering what more we could do to increase automation, for example in the provision of local authority entitlements where eligibility aligns with eligibility of devolved benefits.
- reviewing learning from existing automated and linked-entitlement processes across devolved benefits to better understand where similar approaches may have the potential to simplify access to support in the future.
- exploring where eligibility criteria and client journeys overlap across devolved benefits, identifying opportunities where existing entitlement information could potentially be used to reduce the need for separate applications or additional client action.
- working with Social Security Scotland and relevant stakeholders to develop a stronger understanding of the potential opportunities and risks associated with expanding automation and linked-entitlement approaches.
- building an evidence base on where automation and entitlement-led approaches have the greatest potential to improve client experience, deliver efficiency and value, reduce administrative burden and support increased take-up, while maintaining trust, transparency and appropriate safeguards.

Phase 2 - testing and developing new approaches

This phase will focus on those opportunities identified as offering the greatest potential benefits to clients and the wider system. Depending on the outcomes of Phase 1, this could include testing approaches within the Five Family Payments, carer benefits and disability benefits where eligibility criteria, client circumstances or existing data create opportunities for more joined-up processes. We will also explore how technology and service design changes can help reduce avoidable administration while maintaining trust, transparency, appropriate safeguards and person-centred support.

Alongside testing individual approaches, we will assess the operational, technical and legislative implications of wider implementation. This will help us understand not only whether automation can improve the client experience, but also how it can contribute to wider public service reform ambitions by creating services that are more efficient, preventative, joined up and responsive to people's needs.

Phase 3 - embedding proactive and joined-up support

Building on the evidence and learning gathered throughout the Strategy period, we will develop a longer-term action plan for how entitlement-led automation can support a more integrated and preventative system of public services. This will include identifying opportunities for wider implementation, future investment priorities and any legislative, technical or operational changes required to support further expansion.

Over time, people should experience a system that is increasingly organised around the client and what they are entitled to receive rather than what they know to apply for. Existing entitlement information should be used more effectively to identify opportunities for additional support, reducing unnecessary administrative barriers and making access to services more straightforward.

By the end of this Strategy period, we expect to have established the evidence base, partnerships and delivery models needed to support further work on automation and linked-entitlement services through the next Benefit Take-up Strategy (2031-36). This Strategy therefore represents an important foundation phase, laying the groundwork for simpler client journeys, improved take-up and a more joined-up approach to public service delivery.

6. A more joined-up system for Scotland

This Strategy and its actions reflect our commitment to public service reform. Scotland's Public Service Reform Strategy is clear that public services need to become more preventative, more joined-up and more efficient. Maximising benefit take-up has an important role in that reform agenda because social security is one of the most direct ways public services can increase household incomes, reduce financial insecurity and help people access support before difficulties escalate.

Over the next five years the commitments in this Strategy will help shift benefit take-up activity from a model that relies too heavily on individuals finding their own way through complexity, towards one where services work together more effectively and responsively around people's lives. Data sharing, signposting and referrals will support better connections between services; pre-application support will help people take the next step with confidence; awareness-raising, outreach and engagement will help information reach people through trusted routes; and accessible processes and automation will help reduce unnecessary administrative burden.

Taken together, these four areas of progression position benefit take-up as part of a broader public service approach to prevention, income maximisation, financial wellbeing and poverty reduction. They support the Tackling Child Poverty Delivery Plan by helping maximise family incomes and strengthening links between social security, local services and wider family support. They also support wider equality ambitions by helping reduce practical, structural and communication barriers that can prevent people, including disabled people and seldom-heard groups, from accessing support.

Achieving this ambition will require collective effort. The Scottish Government, Social Security Scotland, local authorities, public services, community organisations, advice providers, disabled people's organisations, carers organisations, health services and the UK Government all have a role to play in helping people access their full package of entitlements.

The wider policy and delivery landscape will also continue to evolve over the next five years. This includes developments within the UK social security system that may affect the ability of people in Scotland to access their full entitlement, including findings from the Timms Review of Personal Independence Payment, The Milburn Review into Young People and Work, and the UK Government's review of carer benefits. We will continue to assess and respond to these changes, where appropriate, as we progress delivery under this Strategy.

7. Measuring success

This Strategy provides a national framework for maximising benefit take-up over 2026 to 2031. It sets out the outcomes we want to achieve for people, the areas where action is most needed, and the commitments that will guide delivery over the lifetime of the Strategy.

The actions set out in Section 5 are strategic Phase 1 activities rather than a detailed operational delivery plan. They identify the key areas of activity that will guide delivery in the first phase of the Strategy and show how we will begin making progress towards the outcomes set out in Section 4. Detailed delivery planning will flow from the Strategy and be developed with the relevant policy, operational, analytical and delivery partners. Delivery will be subject to operational feasibility, partner capacity, affordability, and delivery priorities.

Success will not be measured by benefit take-up rates alone. It will also be measured by whether people experience the outcomes set out in Section 4. This may include whether people understand their rights, know where to turn for support, feel confident accessing services, are connected to the right support at the right time, and experience simpler and more accessible processes.

Services delivering activity under each of the four areas of progression will be expected to consider how their work contributes to these outcomes and, where appropriate, gather evidence to demonstrate progress and impact. This evidence may include monitoring information, operational data, client insight, stakeholder feedback, lived experience, service performance information and evaluation findings.

Where new approaches, services or pilots are developed, appropriate monitoring and evaluation arrangements will be agreed as part of implementation planning. Where analytical support is required, evaluation activity will be scoped with relevant analytical teams and partners, taking account of available resources, delivery timescales and wider analytical priorities.

Progress against the Strategy will be reported through future benefit take-up publications, alongside take-up estimates where robust data is available. These annual publications will also provide updates on delivery progress, evidence and learning against the outcomes set out in this Strategy.

Glossary

Benefit take-up: The extent to which people who are entitled to a benefit receive it. Improving benefit take-up means helping more eligible people access the support they are entitled to.

Entitlement: Financial support, services or assistance that an individual is eligible to receive based on their circumstances and the relevant rules or legislation.

Devolved benefit: A social security benefit delivered primarily by Social Security Scotland. Examples include Scottish Child Payment and Adult Disability Payment. Some benefits may also be delivered through local authorities and Department for Work and Pensions under powers devolved to Scotland. Examples include Blue Badges, Scottish Welfare Fund and Employee Injury Assistance.

Reserved benefit: A social security benefit that is the responsibility of the UK Government and is usually delivered by the Department for Work and Pensions (DWP). Examples include Universal Credit and Pension Credit.

Means-tested benefits: Benefits where eligibility depends on a person's or household's income, savings and financial circumstances. Entitlement is determined by whether these circumstances fall within specified limits or criteria.

Signposting: Providing information about other services, support or entitlements that may be relevant to a person. Signposting does not involve sharing personal information with another organisation and it is up to the individual to decide whether to contact the service.

Referral pathway: A structured process that enables one organisation to share relevant information with another organisation, where appropriate and lawful, so that additional support can be offered. Referral pathways go beyond signposting by actively connecting people to support.

Pre-application support: Support provided before a person makes an application for a benefit. This can include information, advice, advocacy, help understanding eligibility and practical assistance with preparing an application.

Data sharing: The lawful and secure sharing or use of information between organisations to improve services, reduce duplication and help people access the support they are entitled to.

Independent advocacy: Support that helps people express their views, understand information, make informed choices and participate in decisions that affect them. Advocacy is independent because it acts solely in the interests of the person receiving support.

Income maximisation: Helping people increase their household income by ensuring they receive all the financial support, benefits and entitlements they are eligible for, and by connecting them to wider advice and support services.

Lived experience: Knowledge, insight and expertise gained through direct personal experience of a particular issue, service or circumstance. In this Strategy, it often refers to people who have experience of the social security system.

Seldom-heard groups: People or communities who may be less likely to engage with public services, participate in consultation or access support. They may face barriers related to factors such as disability, language, culture, geography, poverty or discrimination.

Intersectionality: The way in which different aspects of a person's identity and circumstances, such as disability, ethnicity, age, gender, poverty, caring responsibilities or geography, can combine and interact to create unique experiences of advantage, disadvantage or barriers to accessing support.

Stigma: Negative attitudes, perceptions or stereotypes that can lead people to feel ashamed, judged or reluctant to seek support. In the context of social security, stigma can discourage people from exploring or applying for benefits they are entitled to receive.

Whole Family Support: An approach that works with families as a whole, recognising their different needs and circumstances, and bringing services together to provide coordinated support that improves outcomes for every family member.

Place-based approach: An approach to service design and delivery that is tailored to the needs, circumstances and strengths of a particular community or geographic area. It recognises that barriers to accessing support can vary between places and that local knowledge, partnerships and trusted organisations are often best placed to respond to local needs.

Trauma-informed: An approach that recognises the impact that trauma can have on people's lives and seeks to ensure services are delivered in ways that are safe, supportive, respectful and avoid causing further distress.

Cultural competence: The ability of organisations and staff to understand, respect and respond appropriately to the cultural, linguistic, religious and social backgrounds of different people and communities.

Public Service Reform: Improving how public services are designed and delivered so they are more preventative, joined up, effective, efficient and focused on improving outcomes for people.

Linked entitlement: An entitlement to one benefit, payment or service that arises because a person already receives another benefit or support. Linked entitlements can reduce the need for additional applications or evidence.

Passported entitlement: A benefit, payment or service that a person becomes eligible for automatically, or through a simplified process, because they already receive a benefit.

Automation: The use of systems, data and technology to carry out processes or make awards automatically where eligibility criteria are met, reducing the need for additional action by individuals.

Digital exclusion: Barriers that prevent people from accessing or using digital services effectively. This may include lack of internet access, devices, digital skills, confidence or accessible technology.



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