

Scheduled Reviews

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This chapter covers the following topics:

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[H1] Introduction

1. This chapter covers the topic of scheduled reviews of existing Pension Age Disability Payment (PADP) awards.
2. Case managers should read this chapter together with the following chapters:
 - Principles of Decision-Making
 - Determinations and awards
 - PADP rates & criteria, which explains the rates of PADP
 - Relevant considerations when making a determination for an award review, which explains our approach to reviews, including what considerations and information are relevant when carrying out reviews
 - Choosing an Appropriate Review Period, which sets out which factors case managers should consider when setting a review period or making an indefinite award
 - Operational guidance, which provides information on the process of carrying out scheduled reviews.

[H1] What scheduled reviews are

3. Social Security Scotland disability benefits are ongoing. This means that they don't have an end date after which the individual has to reapply in order to remain entitled to assistance.
4. In PADP cases, if the individual's needs are likely to change in the future, case managers set a period of time after which awards are reviewed to make a new determination of the individual's entitlement to PADP¹. This period is called a review period.

1 PADP regs, reg. 39

5. The decision whether an individual is still entitled to PADP and, if so, at what rate, is called a determination without application.

6. Scheduled reviews ensure that the individual continues to receive the assistance to which they are entitled. The determination will decide the individual's entitlement to PADP and take into consideration a change to the individual's entitlement.
7. In order to make a determination, the case manager may ask an individual to provide information so they can make a decision on¹:
 - whether the individual is entitled to PADP
 - what rate of PADP the individual is entitled to.

1 SS(S) Act 2018, s. 54(1)

8. All scheduled reviews are light-touch. For more information on light-touch reviews see the Relevant considerations when making a determination for an award review chapter and Operational Guidance.
9. For more information on how to carry out scheduled reviews refer to the Operational Guidance on scheduled reviews

[H1] When new determinations take effect

10. Attendance Allowance clients with a fixed term award will have a Pension Age Disability Payment scheduled review carried out by us after their case has transferred. In some of these cases, we have had to delay the review date so that it does not overlap with the case transfer process. In these cases where the review has been delayed, we may need to use the backdating guidance in the case transfer chapter to set the correct date for any increase of entitlement.
11. Please note this will not apply to all cases
12. For cases with a review date before 1 March 2026, you should check whether the review has been delayed because of case transfer. To do this, check the case transfer evidence in SPM for the end date of the DWP fixed term award, then subtract 20 weeks. If the result is the same as the review date in SPM, then follow the usual scheduled review process in this chapter. If the result is earlier than the review date in SPM, then follow guidance in the Pension Age Disability Payment Case Transfer chapter.
13. For any cases with a review date on or after 1 March 2026, and for all other scheduled reviews generally, follow the scheduled review guidance in this chapter.

14. Individuals in receipt of disability benefits have the duty to report changes of circumstances to Social Security Scotland¹. People are expected to report a change of circumstances that is likely to impact on their level of entitlement as soon as reasonably practicable after that change happened. This then triggers an unscheduled review.

1 SS(S) Act 2018, s. 56

15. The rules on when entitlement starts in these scenarios are set out in the Change of Circumstances: change in care needs DMG chapter.
16. However, people might not proactively report a change of circumstances and might only tell us about that change in their next scheduled review.
17. For scheduled reviews an increase in their entitlement will normally take effect on the date the case manager makes the determination¹.

PADP regs, reg. 37(1)(e)

18. In a situation where the award is due to increase and an individual proactively tells us that there are clear reasons as to why they were unable to report a change sooner, you should consider whether it would be unjust not to set an earlier start date for their increase in entitlement¹.

PADP regs, reg. 37(2)

19. If the individual challenges the initial determination and gives a reason for why an earlier date should be considered the case manager must consider this and choose an earlier date if they feel it would be unjust not to do so. Where the scheduled review includes multiple changes, it is possible separate determinations may be needed. This will depend on the reason given (for an earlier date) and whether this affects all changes, or just one of them.
20. If you've established that it would be unjust not to set an earlier date, you should refer to the section "Setting an earlier start date if it would be unjust not to do so" for a change resulting in increased entitlement or for more detail on when these changes will take effect.
21. It is possible that a review reveals a decrease in the individual's level of needs which they should have reported earlier. Where the individual has knowingly failed to report such a change or failed to notify the change as soon as reasonably practicable after that change occurring, the case manager would set the date of either :
- lower entitlement
 - cessation of entitlement
- to the date the individual should have notified the change¹.
See guidance at section "If the decrease should have been reported sooner"

In any other case where the review reveals a decrease this change should take effect from the date of the determination².

1 PADP regs, reg. 38(1)(b)(i)
2 PADP regs, reg. 38(1)(b)(ii)

22. In a situation where the individual tells us that there are clear reasons why a later date would be more fair for a reduced award to commence from, you should consider whether it would be unjust not to set a later start date for their decrease in entitlement¹.

1 PADP regs, reg. 38(2)

23. If you've established that it would be unjust not to set a later date, you should refer to the section "If the decrease should have been reported sooner" for a change resulting in decreased entitlement or ceased entitlement for more detail on when these changes will take effect.

[H2] If there has been no change in level of entitlement

24. If the individual returns their review pack and reports that they have either
- not experienced a change
 - experienced a change in need that does not translate into a change in entitlement

the case manager should make a determination that the award will remain the same and set an appropriate review period. See the Choosing an Appropriate Review Period chapter for guidance on how to set an appropriate review period and to understand whether an indefinite award would be appropriate [LINK].

25. This new determination will take effect on the date the case manager makes the determination without application¹.

1 PADP regs, reg. 37(1)(e)

[H2] If there has been an increase in level of entitlement

26. This section covers scenarios where the individual reports a change of circumstances.

27. If the individual both
- returns their review pack and reports an increase in need that leads to an increase in entitlement,
 - has already met the backwards test for this increase,

their change in entitlement will take effect on the date the case manager makes the determination without application¹.

1 PADP regs, reg. 37(1)(e)

28. Individuals must satisfy the backwards test before they can become entitled to an increased rate of PADP when their award is reviewed. For more information on the backwards test please refer to the Backwards Test chapter. Reference should also be made to the 'Change of circumstances: change in care needs' chapter for guidance on applying the backwards test appropriately.

Example – a client reports a change

The client returns their review pack on 1 February 2026, shortly after having received it. The client reports a change in circumstances and tells us that their level of needs increased from 1 January 2026.

A case manager picks this up to process in March 2026. After considering all the information they determine the award will increase. Following normal scheduled review rules, this would mean that the client's increase would start from the date of determination. This would be March 2026.

However, the client has not yet met the backwards test for this increase on the date the case manager is ready to make a determination. The change in their level of needs was on 1 January 2026. They meet the backwards test for this on 1 July 2026. So, the increase in award should take effect from the 1 July 2026 when they first meet the backwards test.

Example – a client reports their changes late

The client returns their review pack on 1 February 2026, shortly after having received it. The client reports a change in circumstances and tells us that their level of needs increased on 15 June and 1 September 2025, respectively.

A case manager picks this up to process in March 2026. They make a new determination on 25 March. The award increases.

The client met the backwards test for their changes on 14 December and 2 March 2026, respectively.

As the determination was made later than that, this means the case manager uses the date of determination to set when any increase in award takes effect. This is on 25 March 2026.

[H3] Setting an earlier start date if it would be unjust not to do so

29. There are circumstances that would make it unjust not to set an earlier date for the increase in entitlement to take effect¹.

1 PADP regs, reg. 37(2)

30. Case managers should make the decision
- whether it would be unjust not to set an earlier date
 - what that earlier date should be,

based on information already available to them. This could be, for example, through details provided on the client's review form or further information provided later in a redetermination form.

31. One scenario where it would be unjust not to set an earlier start date would be where both:

- the award review has been delayed
- the delay was caused by Social Security Scotland

32. Examples of scenarios where Social Security Scotland is responsible for delays in reviewing a case include:

- forms or documents submitted by the individual as part of their review have got lost
- pre-review notifications or review packs were not sent out on time
- after completed review forms have been received, reviews are concluded more than 12 weeks after their review date

This list is not exhaustive.

33. The case manager must refer to the relevant operational guidance chapter where processing has been delayed and DMG chapter when deciding whether setting an earlier date would be appropriate [LINK].

34. Another scenario would be where the client reaches out to Social Security Scotland to explain that they didn't notice the change, or have a good reason not to have reported it within a reasonable timeframe due to, for example:

- Impacts of their condition or overall health
- Bereavement
- A hospital stay

This list is not exhaustive.

35. If a case manager is uncertain about whether it would be unjust to not set an earlier date for a change of entitlement, they should seek advice from their decision team manager.

Example – a client has provided a good reason for reporting a change late

The client returns their review pack on 1 February 2026, shortly after having received it. The client reports a change in circumstances which means their level of needs increased from 1 July 2025.

A case manager makes a new determination on 1 April 2026 and the award increases.

The client mentioned on their review form that, due to the increase in severity of their mental health condition and subsequent change in medication, they've been struggling with living an organised life, including completing administrative tasks. They've been feeling unable to report the change sooner, due to still adjusting to their new medication.

Based on this information, the case manager establishes that the client has good reason for not reporting their change earlier, when it occurred. Therefore, they decide that it would be unjust not to set an earlier start date for the increased award. They set the start date to be the date the client first met the eligibility criteria for the increased entitlement. This is 26 weeks after 1 July 2025, which is 30 December 2025

[H2] If there has been a decrease in level of entitlement

36. This section covers scenarios where

- the individual reports a change of circumstances leading to a decrease or end of entitlement, and
- the entitlement arising from this change continues throughout the review and beyond.

37. If during a scheduled review a case manager determines that both:

- there has been a change in the individual's level of need
- this change leads to either a decrease or end of entitlement

this change will take effect on the date that it would have been reasonably practicable to expect the individual to have notified of the change¹. See guidance at section "If the decrease should have been reported sooner"

1 PADP regs, reg. 38(1)(b)(i)

³⁸. In any other case, this change should take effect from the date the case manager makes the determination without application².

2 PADP regs, reg. 38(b)(ii)

39. However, the date when a change comes into effect can be different if it would be unjust not to set a later start date for the new entitlement. See "Setting a later start date if it would be unjust not to do so"³.

Example 1

A client experiences a decrease in needs on 15 January 2026.

Their change in needs becomes apparent during their scheduled review, when they return their review pack to Agency on 1 February 2026.

The determination is made on 1 March 2026.

As the client reported their decrease in needs within one month of them occurring, the start date of their new entitlement is the date the case manager makes the determination.

H3] If the decrease should have been reported sooner

40. It is possible that a scheduled review reveals a change in the individual's level of needs, resulting in a decrease of entitlement, which they should have reported sooner. To find out whether that is the case, refer to the Change of Circumstances: Change in care needs chapter.

41. If the individual either

- knowingly fails to report the change
- fails to report the change as soon as reasonably practicable after the change occurred,

the case manager would set the date of either:

- change
- end

of entitlement to the date the individual should have notified the change¹.

1 PADP regs, reg. 38(1)(b)(i)

42. In all other cases, the decrease or end of, entitlement should take effect when the case manager makes the determination.

43. The case manager should use the timeframes set out in the Change of circumstances: change in care needs chapter to establish whether the individual could reasonably have been expected to report this change sooner. This is to establish when the individual's change of entitlement begins.

Example: A client reports their decrease in needs late

An individual is in receipt of a higher rate award of PADP. During their scheduled review, they report a decrease in their night-time needs which they could have been reasonably expected to report on 1 October 2025.

Their change in needs becomes apparent during their scheduled review, when they return their review pack to Agency on 1 January 2026.

The determination is made on 1 March 2026.

The client should have reported the change shortly after 1 October 2025. The case manager sets the start date for their reduced entitlement to this date.

44. If the individual should have reported their change sooner, but informs the case manager of circumstances which meant they could not report the change sooner, the case manager can set a later start date for the change in entitlement, if it would be unjust not to do so. See the 'Setting an later start date if it would be unjust not to do so' section for more information

[H3] Setting a later start date if it would be unjust not to do so

45. When completing the change of circumstances form as part of their review pack, clients might tell us that they have circumstances which meant they could not report their change sooner or give a reason why they think a reduction in their award should happen from a later date.
46. The case manager can set a later start date (than the date they should have notified us) if the entitlement has decreased or ended following the determination. This is only possible if it would be unjust not to do so¹. One example would be where the individual's condition has improved slowly and the decrease in needs was therefore not noticed for a while, however they should still have reported it before they reached scheduled review.
- 1 PADP regs, reg. 38(2)*
47. The case manager must refer to the relevant DMG chapter when deciding whether setting a later start date would be appropriate [LINK].
48. If a case manager is uncertain about whether it would be unjust to not set a later date for a change of entitlement, they should seek advice from their decision team manager.

Example – a client has reported circumstances which meant they were unable to report the change earlier

A client experiences a decrease in needs on 1 July 2025.

Their change in needs becomes apparent during their scheduled review, when they return their review pack to Agency on 1 January 2026, shortly after receiving it.

The determination for their scheduled review is made on 1 March 2026.

After submitting their review form, the client calls Social Security Scotland and explains that they did not report their change when it occurred, because they had

a bereavement in the family around the same time. The case manager establishes that the client could have been reasonably expected to notice and report their change at the beginning of September 2025.

The case manager therefore sets September 2025 as the effective date of determination.

Example: a client requests a redetermination

A client experiences a decrease in needs on 1 July 2025.

Their change in needs is reported during their scheduled review, when they return their review pack to Agency on 1 January 2026, shortly after receiving it.

The determination for their scheduled review is made on 1 March 2026. The case manager sets 1 July 2025 as the start date for the new entitlement.

The client requests a redetermination. Their social worker contacts the Agency to explain that the client leads a chaotic life and, due to their circumstances, could not reasonably have been expected to notice the change in their needs. They also explain that they had to remind the client to submit their review form before the deadline.

The case manager processing the redetermination establishes that the client could not have been reasonably expected to notice and report their change before the date they did report it (1 July 2025).

The case manager sets the start date for the new entitlement to 1 March 2026, which is the date the original review determination was made.

Example: a client has circumstances which meant they could not report one of their changes sooner

A client experiences a decrease in needs on 1 July 2025 as well as on 1 December 2025.

Their changes in needs become apparent during their scheduled review, when they return their review pack to Agency on 1 February 2026, shortly after receiving it.

The determination for their scheduled review is made on 1 April 2026.

On their review form, the client informs Social Security Scotland and explains that they did not report their second change when it occurred, because they were in hospital with a broken leg. The case manager establishes that the client could

have been reasonably expected to notice and report this change by mid-January 2026.

The case manager establishes that they will have to make two separate determinations to account for the different dates the changes will come into effect.

For the first decrease in award there is nothing to suggest that they were not able to report this change around the time it happened. This means this change should come into effect on 1 July .

For the second change, 15 January 2026 is set as the effective date for this decrease in award as this is the date the client could have been reasonably expected to notice and report the change.

END OF CHAPTER