



Department for

Communities

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Commonities

Section 75 Screening Form

Part 1. Policy scoping

The first stage of the screening process involves scoping the policy under consideration. The purpose of policy scoping is to help prepare the background and context and set out the aims and objectives for the policy, being screened. At this stage, scoping the policy will help identify potential constraints as well as opportunities and will help the policy maker work through the screening process on a step by step basis.

Public authorities should remember that the Section 75 statutory duties apply to internal policies (relating to people who work for the authority), as well as external policies (relating to those who are, or could be, served by the authority).

Information about the policy

Name of the policy

The Universal Credit, Housing Benefit, Employment and Support Allowance and State Pension Credit (Carer's Allowance Reassessment Capital Disregard) (Amendment) Regulations (Northern Ireland) 2026 ("the Regulations").

Is this an existing, revised or a new policy?

Revised

What is it trying to achieve? (intended aims/outcomes)

The purpose of the Regulations is to ensure that payments made to refund overpayments arising from the Carer's Allowance reassessment exercise are disregarded as capital indefinitely in respect of income-based benefits.

Background and proposed changes

Following an Independent Review of Carer's Allowance (CA) overpayments, the DWP is reassessing certain earnings-related CA overpayment decisions made between 2015 and summer 2025. Some claimants may receive refunds or have overpayments reduced as a result. To ensure these corrective payments do not adversely affect entitlement to means-tested benefits, the Department proposes regulations to disregard CA reassessment refunds as capital indefinitely for Universal Credit (UC), Pension Credit (PC), Housing Benefit (HB) and Employment and Support Allowance (ESA).

The Regulations mirror corresponding provisions introduced in Great Britain and are expected to affect a limited number of carers in Northern Ireland.

Are there any Section 75 categories which might be expected to benefit from the intended policy?

No specific categories identified

This proposed change will have a beneficial impact for those customers impacted across all Section 75 categories.

If Yes, explain how.

N/A

Who initiated or wrote the policy?

The Department for Work and Pensions.

Who owns and who implements the policy?

The Department for Work and Pensions in Great Britain.
The Department for Communities in Northern Ireland.

Implementation factors

Are there any factors which could contribute to/detract from the intended aim/outcome of the policy/decision? Yes

If yes, are they

☐ financial

- ☒ legislative
- ☐ other, please specify _____

Main stakeholders affected

Who are the internal and external stakeholders (actual or potential) that the policy will impact upon?

- ☒ staff
- ☒ service users
- ☒ other public sector organisations
- ☐ voluntary/community/trade unions
- ☐ other, please specify _____

Other policies with a bearing on this policy

What are they and who owns them?

N/A.

Available evidence

Evidence to help inform the screening process may take many forms. Public authorities should ensure that their screening decision is informed by relevant data.

What evidence/information (both qualitative and quantitative) have you gathered to inform this policy? Specify details for **each** of the Section 75 categories.

The Regulations apply to claimants who receive a lump-sum payment arising from the Carer's Allowance reassessment exercise. The amendments are technical in nature and provide a capital disregard only. They do not alter eligibility conditions for CA, UC, HB, ESA or SPC, nor do they introduce any new qualifying criteria. The purpose of the Regulations is to maintain existing benefit entitlement by preventing the lump-sum payment from adversely affecting means-tested benefit awards.

No adverse impacts on any Section 75 category have been identified.

Section 75 category	Details of evidence/information
Religious belief	The Department does not hold specific data in relation to a person's religious belief for those recipients who may be due a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits.
Political opinion	The Department does not hold specific data in relation to a person's political opinion for those recipients who may be due a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits.
Racial group	The Department does not hold specific data in relation to a person's racial group for those who may be due a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits.

Section 75 category	Details of evidence/information
Age	The Department does not hold specific data in relation to the impact of a person's age on those who may be due a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits.
Marital status	The Department does not hold specific data in relation to a person's marital status for those recipients who may be due a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits.
Sexual orientation	The Department does not hold specific data in relation to a person's sexual orientation for those recipients who may be due a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits.
Men and women generally	The Department does not hold specific data in relation to the impact a person's gender may have on those who may be due a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits.
Disability	The Department does not hold specific data in relation to a person's disability for those recipients who may be due a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits.
Dependants	The Department does not hold specific data in relation to a person's dependents for those recipients who may be due a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits.

Note to reader - If you are aware of and would like the Department to take into account any further evidence or information relevant to this policy, please send this to:

Social Security Policy & Legislation Division
Department for Communities
Causeway Exchange
Level 8
1-7 Bedford Street
Belfast
BT2 7EG
E-mail: SSPLD@communities-ni.gov.uk

Needs, experiences and priorities

Taking into account the information referred to above, what are the different needs, experiences and priorities of each of the following categories, in relation to the particular policy/decision?

Specify details for **each** of the Section 75 categories

Section 75 category	Details of needs/experiences/priorities
Religious belief	There is no evidence to suggest that people of different religious beliefs have different needs, experiences and priorities in relation to the policy.
Political opinion	There is no evidence to suggest that people of different political opinion have different needs, experiences and priorities in relation to the policy.
Racial group	There is no evidence to suggest that people of different racial or ethnic group have different needs, experiences and priorities in relation to the policy.
Age	There is no evidence to suggest that people of different age groups have different needs, experiences and priorities in relation to the policy.
Marital status	There is no evidence to suggest that people of different marital status have different needs, experiences and priorities in relation to the policy.
Sexual orientation	There is no evidence to suggest that people of different sexual orientation have different needs, experiences and priorities in relation to the policy.

Section 75 category	Details of needs/experiences/priorities
Men and women generally	There is no evidence to suggest that men and women have different needs, experiences and priorities in relation to the policy.
Disability	There is no evidence to suggest that people with or without a disability have different needs, experiences and priorities in relation to the policy.
Dependants	There is no evidence to suggest that people with or without dependants have different needs, experiences and priorities in relation to the policy.

Part 2. Screening questions

Introduction

In making a decision as to whether or not there is a need to carry out an equality impact assessment, the public authority should consider its answers to the questions 1-4 which are given on pages 66-68 of this Guide.

If the public authority's conclusion is **none** in respect of all of the Section 75 equality of opportunity and/or good relations categories, then the public authority may decide to screen the policy out. If a policy is 'screened out' as having no relevance to equality of opportunity or good relations, a public authority should give details of the reasons for the decision taken.

If the public authority's conclusion is **major** in respect of one or more of the Section 75 equality of opportunity and/or good relations categories, then consideration should be given to subjecting the policy to the equality impact assessment procedure.

If the public authority's conclusion is **minor** in respect of one or more of the Section 75 equality categories and/or good relations categories, then consideration should still be given to proceeding with an equality impact assessment, or to:

- measures to mitigate the adverse impact; or
- the introduction of an alternative policy to better promote equality of opportunity and/or good relations.

In favour of a 'major' impact

- a) The policy is significant in terms of its strategic importance;
- b) Potential equality impacts are unknown, because, for example, there is insufficient data upon which to make an assessment or because they are complex, and it would be appropriate to conduct an equality impact assessment in order to better assess them;
- c) Potential equality and/or good relations impacts are likely to be adverse or are likely to be experienced disproportionately by groups of people including those who are marginalised or disadvantaged;
- d) Further assessment offers a valuable way to examine the evidence and develop recommendations in respect of a policy about which there are

concerns amongst affected individuals and representative groups, for example in respect of multiple identities;

- e) The policy is likely to be challenged by way of judicial review;
- f) The policy is significant in terms of expenditure.

In favour of 'minor' impact

- a) The policy is not unlawfully discriminatory and any residual potential impacts on people are judged to be negligible;
- b) The policy, or certain proposals within it, are potentially unlawfully discriminatory, but this possibility can readily and easily be eliminated by making appropriate changes to the policy or by adopting appropriate mitigating measures;
- c) Any asymmetrical equality impacts caused by the policy are intentional because they are specifically designed to promote equality of opportunity for particular groups of disadvantaged people;
- d) By amending the policy there are better opportunities to better promote equality of opportunity and/or good relations.

In favour of none

- a) The policy has no relevance to equality of opportunity or good relations.
- b) The policy is purely technical in nature and will have no bearing in terms of its likely impact on equality of opportunity or good relations for people within the equality and good relations categories.

Taking into account the evidence presented above, consider and comment on the likely impact on equality of opportunity and good relations for those affected by this policy, in any way, for each of the equality and good relations categories, by applying the screening questions given overleaf and indicate the level of impact on the group i.e. minor, major or none.

Screening questions

1. What is the likely impact on equality of opportunity for those affected by this policy, for each of the Section 75 equality categories? minor/major/none

Section 75 category	Details of policy impact	Level of impact? minor/major/none
Religious belief	We do not expect there to be any adverse impact on people of different religious beliefs. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.	None.
Political opinion	We do not expect there to be any adverse impact on people of different political opinion. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.	None.

Section 75 category	Details of policy impact	Level of impact? minor/major/none
Racial group	We do not expect there to be any adverse impact on people of different racial groups. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.	None.
Age	We do not expect there to be any adverse impact on a particular age group. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.	None,
Marital status	We do not expect there to be any adverse impact on people in or not in a marriage (or civil partnership). This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of	None.

Section 75 category	Details of policy impact	Level of impact? minor/major/none
	means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.	
Sexual orientation	We do not expect there to be any adverse impact on people of different sexual orientation. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.	None.
Men and women generally	We do not expect there to be any adverse impact on people of different gender. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.	None.

Section 75 category	Details of policy impact	Level of impact? minor/major/none
Disability	We do not expect there to be any adverse impact on people with disabilities. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.	None.
Dependants	We do not expect there to be any adverse impact on people with dependants. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.	None.

2. Are there opportunities to better promote equality of opportunity for people within the Section 75 equalities categories?

Section 75 category	If Yes , provide details	If No , provide reasons
Religious belief		This policy does not offer any opportunity to better promote equality of opportunity for people of different religious beliefs. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.
Political opinion		This policy does not offer any opportunity to better promote equality of opportunity for people of different political opinion. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-

Section 75 category	If Yes , provide details	If No , provide reasons
		tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment
Racial group		This policy does not offer any opportunity to better promote equality of opportunity for people from different racial groups. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment
Age		This policy does not offer any opportunity to better promote equality of

Section 75 category	If Yes , provide details	If No , provide reasons
		opportunity for people of different ages. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.
Marital status		This policy does not offer any opportunity to better promote equality of opportunity for people of different marital status. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount

Section 75 category	If Yes , provide details	If No , provide reasons
		of benefit if they receive a refund payment.
Sexual orientation		This policy does not offer any opportunity to better promote equality of opportunity for people of different sexual orientation. This policy is specific those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.
Men and women generally		This policy does not offer any opportunity to better promote equality of opportunity between men and women generally. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-

Section 75 category	If Yes , provide details	If No , provide reasons
		tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.
Disability		This policy does not offer any opportunity to better promote equality of opportunity for people with a disability. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.
Dependants		This policy does not offer any opportunity to better promote equality of opportunity for people

Section 75 category	If Yes , provide details	If No , provide reasons
		with or without dependants. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment

3. To what extent is the policy likely to impact on good relations between people of different religious belief, political opinion or racial group? minor/major/none

Good relations category	Details of policy impact	Level of impact minor/major/none
Religious belief	The proposed legislation is likely to have no impact on good relations between people of different religious beliefs.	None.

Good relations category	Details of policy impact	Level of impact minor/major/none
Political opinion	The proposed legislation is likely to have no impact on good relations between people of different political opinions.	None.
Racial group	The proposed legislation is likely to have no impact on good relations between people of different racial groups.	None.

4. Are there opportunities to better promote good relations between people of different religious belief, political opinion or racial group?

Good relations category	If Yes , provide details	If No , provide reasons
Religious belief		This policy does not offer any opportunity to better promote good relations between people of different religious beliefs. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in

Good relations category	If Yes , provide details	If No , provide reasons
		receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.
Political opinion		This policy does not offer any opportunity to better promote good relations between people of different political opinions. This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.
Racial group		This policy does not offer any opportunity to better promote good relations between people of different racial groups.

Good relations category	If Yes , provide details	If No , provide reasons
		This policy is specific to those recipients who are entitled to a Carer's Allowance reassessment refund payment and who are in receipt of means-tested benefits. This is a positive measure to ensure that those in receipt of an income-related social security benefit do not face a reduction in their amount of benefit if they receive a refund payment.

Additional considerations

Multiple identity

Generally speaking, people can fall into more than one Section 75 category.

Taking this into consideration, are there any potential impacts of the policy/decision on people with multiple identities?

(For example; disabled minority ethnic people; disabled women; young Protestant men; and young lesbians, gay and bisexual people).

Provide details of data on the impact of the policy on people with multiple identities. Specify relevant Section 75 categories concerned.

There is no available data on section 75 categories therefore the actual impacts on categories with multiple identities cannot be quantified.

Part 3. Screening decision

In light of your answers to the previous questions, do you feel that the policy should: (please underline one)

- 1. Not be subject to an EQIA**
- 2. Not be subject to an EQIA (with mitigating measures /alternative policies)**
- 3. Be subject to an EQIA**

If 1 or 2 (i.e. not be subject to an EQIA), please provide details of the reasons why:

Having considered the purpose and effect of the Regulations, no evidence has been identified of a differential adverse impact on any Section 75 equality category. The Regulations are beneficial in nature and are intended to protect claimants from financial disadvantage arising from the receipt of Carer's Allowance reassessment payments.

If 3. (i.e. to conduct an EQIA), please provide details of the reasons:

Mitigation

When the public authority concludes that the likely impact is 'minor' and an equality impact assessment is not to be conducted, the public authority may consider mitigation to lessen the severity of any equality impact, or the introduction of an alternative policy to better promote equality of opportunity or good relations.

Can the policy/decision be amended or changed or an alternative policy introduced to better promote equality of opportunity and/or good relations?

If so, **give the reasons** to support your decision, together with the proposed changes/amendments or alternative policy.

Part 4. Monitoring

Effective monitoring will help identify any future adverse impacts arising from the policy which may lead you to conduct an EQIA, as well as help with future planning and policy development.

You should consider the guidance contained in the Commission's Monitoring Guidance for Use by Public Authorities (July 2007).

The Commission recommends that where the policy has been amended or an alternative policy introduced, then you should monitor more broadly than for adverse impact (See Benefits, P.9-10, paras 2.13 – 2.20 of the Monitoring Guidance).

Please detail proposed monitoring arrangements below:

The Department is committed to monitoring the impacts of its policies and will use evidence from a number of sources to assess the impact on an on-going basis, for example feedback from Departmental employee networks and correspondence from the public and outside bodies.

Part 5 - Approval and authorisation

Screened by:	Position/Job Title	Date
Alice Bradley	DP	09/07/26
Approved by:		
David Tarr	G5	09.07.26

Note: A copy of the Screening Template, for each policy screened should be 'signed off' and approved by a senior manager responsible for the policy, made easily accessible on the public authority's website as soon as possible following completion and made available on request.