

Example Non- residential financial assessment (New)

Mrs B contacts a WSCC Community Team regarding her mother who is requiring non- residential social care. The social worker starts a Care and Support assessment and informs the customer, and/or Mrs B as her representative that a financial assessment is required and asks them to sign a form confirming that if chargeable services are provided, they will pay any assessed contribution required.

The social worker also informs the financial assessment team that a financial assessment is needed, and the request is allocated to an assessor. The assessor evaluates how the financial assessment can be undertaken and determines that as the customer is in receipt of state benefits only, she can be assessed remotely via access to the DWP benefits system which saves Mrs B from having to complete a form or provide any evidence. A financial assessment is completed and a breakdown of the calculation along with details of how any additional information can be provided is sent to the customer. The customer confirms that all information has been considered and then the contribution is finalised and a letter explaining how the charge will be collected is sent back to the customer along with contact details if there should be any further query

Example Non-residential financial assessment (Re assessment)

Mr W is an existing customer and has DWP benefits and an Occupational Pension.

In April/May the financial assessment team write to Mr W and explain that his annual re assessment is due and that as he has an occupational pension, he will need to provide an update of his income for the new financial year. The letter includes an information sheet of the type of evidence he might need to submit.

Mr W is offered a telephone assessment as the update to his pension should be straightforward. Following the telephone call, a financial assessment is completed and as Mr W had identified in the telephone call that he had additional disability related expenses, the letter sent to Mr W not only confirms the contribution that had been calculated but also that it was subject to any evidence that had been requested and that he should submit that evidence as soon as possible. Details of how to submit the information along with contact details for any further queries are included.

Mr W sends in his evidence but also explains that he is worried that he cannot afford the contribution. A financial assessor looks at his circumstances and explains how a review of all his circumstances can be undertaken. After consideration of Mr W's individual circumstances his financial contribution is confirmed, and the revised contribution (if applicable) is amended for the financial year and Mr W continues to pay.