

FACTSHEET – INITIAL FINANCIAL ASSESSMENT INFORMATION

If your Social Worker has assessed that you qualify for adult social care you will be allocated a personal budget for non-residential or residential services.

As part of this process a financial assessment will need to be completed so that we can work out the contribution you could be required to make for any services you may receive.

What this means is that we will look at your financial circumstances to work out how much you can afford.

An officer from the Social Care Financial Assessment Team will contact you by telephone to complete your financial assessment. This will normally be within 28 days of the Social Worker notifying the team that you require a financial assessment.

Information needed to complete your financial assessment

You will need to have the following information ready:

- Your National Insurance Number – you can find this on any letter from the Department for Work and Pensions or on a payslip
- Details of all of your income – this includes any benefits you might receive and / or private income such as Occupational Pension
- Details of any capital or savings you have – this includes both money you have in the bank as well as any other assets such as shares or bonds
- If you own your own home or any other property, we may need some information about this, such as a copy of the title deeds – we can discuss this with you during your assessment
- Details of what you spend on bills – this includes your rent or mortgage, gas and electricity bills etc.
- Details of any extra money you might need to spend because of your disability
- Details of any life insurance policies you hold.

If you are already in residential care

Please be aware that you may be assessed to make a contribution from the date you moved into the home. While we are preparing for your financial assessment, please ensure that other than your usual bills, you spend no more than £24.90 per week (this is the minimum personal allowance amount), to avoid falling into arrears.

If you are already receiving non-residential services

Please be aware that if you are assessed to make a contribution this will be applicable from the date your services actually commence. If you have already started receiving services it may be a good idea to start putting some money to one side to help pay for these costs especially if you are assessed to make a contribution.

If you are assessed to make a contribution the Billing Team will contact you to advise how much you owe and to discuss payment arrangements for your social care costs.

Disclaimer

Please note Sunderland City Council is obligated to protect the public funds it administers and to this end may use the financial assessment information you provide for the prevention and detection of fraud. It may also share the information with other parties responsible for auditing or administering public funds for these purposes.

Contact Us

For more information on the financial assessment process:

Write Social Care Financial Assessment Team
 People Services
 Civic Centre
 Burdon Road
 Sunderland
 SR2 7DN

Telephone 0191 520 5552

E-mail FinancialAssessmentEnquiries@sunderland.gov.uk