



Financial Assessment Information

How to complete your Financial Assessment Form and the information you might need.

Before you start...

1

Make sure you have a **valid email address**.

The invoice email must be provided on the form and it can be either your own personal email address or that of a family member or carer.

2

Income - examples may include Retirement pension, Employment and Support Allowance, Pension Credit, Attendance Allowance, Disability Living Allowance, Personal Independence Allowance, private and occupational pension and all other income.

3

Capital - examples may include savings accounts, ISA accounts, current accounts, building society accounts, investment bonds and all other capital.

4

Expenditure - examples may include mortgage, rent, council tax payments and any disability related expenditure (such as cleaner, gardener, laundry and central call alarm costs).

www.barnsley.gov.uk/financialassessment

Please note you need to provide exact amounts for each type of income, capital and expenditure, you can find this information from a recent bank statement or benefit notification.

It may take approximately 30 minutes to complete the online Financial Assessment form.

Most people will be expected to pay towards the cost of their care however you may be entitled to receive help with your payments. This will be assessed on an individual basis following submission of your Financial Assessment form.

Please note that if you have to pay for your care you will be charged from the date your care services started.

You have 28 days from the date you had a meeting with your social care representative to complete your online Financial Assessment form. If we do not hear from you we will assume that you will pay for your care services. However, if you submit the form after 28 days we will reassess your contribution from the date you submit your online form.

If you have over £23,250 in savings or capital, excluding the value of the home you live in, you will have to pay the full cost of your services. If you wish to opt out of the financial assessment, as you do not wish to disclose details of your finances, you will have to pay the full cost of your services. If your situation fits into either of the above and you require a letter of confirmation please contact us at fsfinancialassessments@barnsley.gov.uk.



For benefit advice, please go online for more information
www.barnsley.gov.uk/benefitsadvice



How to complete your Financial Assessment online

Start...

Please go online to **www.barnsley.gov.uk/financialassessment**

Here you can find more information on completing the form and frequently asked questions. A step-by-step video is also provided.

To begin click on **'Start your Financial Assessment'** box

Then click on **'Calculate my contribution'** box

And click on **'Calculate my non-residential contribution'** box

If you do not have access to the internet at home you can complete the online Financial Assessment form at one of the libraries, please call 01226 773555 to book a PC. You will need to take your library card if you are a library member, if not please take some form of identification with your name on.

It is important that you take all the required information / documents with you in order to fully complete your online form.

Alternatively, if you need more support, you can book an appointment at one of the libraries by ringing 01226 787787 and a member of staff will be available for your appointment.

What happens next?

After you have submitted your Financial Assessment form we may need to contact you to request further information or evidence therefore please check your emails on a regular basis.

Once we finalise your assessment we will email you details using our secure email Egress system.

Please note your financial contribution may alter if you have any changes in your circumstances.

You must therefore inform us within 28 days of any changes in your income, capital, expenditure or personal circumstances at fsfinancialassessments@barnsley.gov.uk.

