

ONLINE FINANCIAL ASSESSMENT

What is the Online Financial Assessment?

The Online Financial Assessment (OFA) is a free, confidential, and easy-to-use online tool that helps you find out if you would be required to contribute towards the cost of your services provided by the Local Authority.

The OFA uses exactly the same details and calculation steps that the Local Authority would use to calculate a customer's contribution.

The OFA will provide an **ESTIMATE ONLY**

When would I use the Online Financial Assessment?

If you are considering or are in the process of being assessed by Adult Social Care to receive care and support services funded by the Local Authority.

The OFA can be used to:

- simply get an idea of what your maximum contribution may be, without submitting the information to the Local Authority's, Social Care Financial Assessment Team (SCFAT)
Or
- submit and upload financial information to the OFA to support your Financial Assessment

How long does it take to complete?

The online financial assessment calculator should take approximately 20-30 minutes to complete, and it is suggested that you have all your financial information to hand before you start.

Note: if you are not active, completing or moving around the web page, the page will prompt you to ask if you still wish to continue completing the calculator, you can click yes and continue to complete the calculator. However, if you do not click yes, the web page will become inactive and you will lose any information that you have already input.

Should I include my partner?

If you have a partner and you are wondering whether to include them or not, it is recommended that you complete the Online Financial Assessment twice, once with your partner and once without. This will provide you with a maximum contribution for both scenarios. If you go on to submit your online financial assessment, SCFAT will review your information to provide you with a better off calculation (maximum contribution) which would be the lower contribution of the two scenarios.

What if I do receive care and support services funded by the Local Authority

If you go on to receive care and support services funded by the Local Authority, at home, in the community, or in a residential home, and you have submitted an OFA then SCFAT will be in touch to verify your information and confirm your contribution.

If you did not submit an OFA initially, and you are going to start to receive care and support services funded by the Local Authority, then you can go online and submit an OFA. You can ask your Social Worker to provide you with your Reference Number, which they will refer to as a Party Identification (PID), which you will input into the OFA.

What if I submit an OFA, but do not go on to receive care and support services funded by the Local Authority?

If you have submitted an OFA, however, you do not go on to receive care and support services funded by the Local Authority, then the OFA information that you submitted will be archived in our systems as part of the Local Authority's information retention policy.

Can I save my Online Financial Assessment and come back to it later?

You are unable to save and return to this online calculator, therefore It would be beneficial if you have details to hand of all your benefits, pensions, earnings, savings, assets, and essential costs. If the online financial assessment web page has been inactive for approximately 20 minutes you will get a screen prompt asking if you wish to leave the page, you should click no and continue. You can then complete the online form and the calculator will tell you what your weekly contribution might be.

Do I have to input into every box, even if it is not applicable to me?

No, you can leave any boxes blank if they are not applicable to your circumstances.

Who can I contact if I am struggling to complete the Online Financial Assessment?

You can contact Sunderland City Council, Health and Wellbeing on 0191 520 5552, and someone will be able to assist you further.

ONLINE FINANCIAL ASSESSMENT

How to access and complete the Online Financial Assessment

<https://sunderland.mycostofcare.com/OFA>

1. Complete all relevant sections of the Online Financial Assessment (OFA)
2. If a question or section is not relevant to you, you do not need to input any information at all, just leave blank
3. As you move through the form completing all relevant sections, you will then reach the Summary Page.
4. However, if you wish to navigate back to a particular section you can either use the navigate buttons at the top of the page or the 'page titles' on the right-hand side panel.
5. The page titles will allow you to move around the assessment when each section has been completed, these sections display in Blue. You can only navigate back and forward into sections that are completed and showing in blue.

self.occsites.co.uk/OFA/?view=PensionPage

Sunderland City Council

Online Financial Assessment

< Benefits Other income > Hide all

Pensions

Please enter details of any pension income you receive. This might include private pensions or the state pension.

Armed Forces Compensation Scheme Payments
The Armed Forces Compensation Scheme (AFCS) compensates for any injury, illness or death which was caused by service on or after 6 April 2005

Amount: £ Owner: Mine Joint Frequency: Weekly

[Comment](#) [Additional item](#)

NCB Pension
This is a National Coal Board Pension

Amount: £ Owner: Mine Joint Frequency: Weekly

[Comment](#) [Additional item](#)

Occupational Pension
Amount: Owner: Frequency:

1 **Your situation**
Hide
Your partner
Your details
Your total savings and assets

2 **Your financial details**
Hide
Savings and assets
Benefits
Pensions
Other income
Essential expenditure
Disability expenditure

3 **Your estimated contribution**
Hide
Summary

4 **Your personal details**
Hide
Additional details
Submit your calculation
Client details

6. As you move through the assessment you can add in comments to support your application, for example you can state the name of your bank account in the comments box by clicking on 'Comment'

Bank Account

If you have more than one bank account, please click on "Additional Item" below, where you can then enter details of other accounts (including any Building Society or Post Office accounts you may hold). Where possible, please upload your latest bank statement for any accounts that you hold, you will be prompted to do this at the end of the online financial assessment before you submit your form.

Amount: Owner: Mine Joint

7. If you need to additional items, for example if you have more than one bank account, use the 'Additional Item' to add another and identify this in the 'Comment Box'

Bank Account

If you have more than one bank account, please click on "Additional Item" below, where you can then enter details of other accounts (including any Building Society or Post Office accounts you may hold). Where possible, please upload your latest bank statement for any accounts that you hold, you will be prompted to do this at the end of the online financial assessment before you submit your form.

Amount: Owner: Mine Joint

Amount: Owner: Mine Joint

8. The Summary Page provides a summary of all the information that you have input and will give you an **estimate** of your **weekly contribution**.

Online Financial Assessment

< Disability expenditure

Your result

We calculate your maximum contribution will be:

£0.00

[How did we calculate this?](#)

Calculation Summary [View Detailed breakdown](#)

Weekly income		Weekly expenditure	
Savings and assets income	£0.00	Essential expenditure	£0.00
Benefits	£92.40	Disability expenditure	£0.00
Pensions	£0.00		
Other income	£0.00		
Total income	£92.40	Total expenditure	£0.00
Income less expenditure <i>Total income - total expenditure</i>			£92.40
age-related allowance			£136.45
Weekly contribution <i>Income - expenditure - age-related allowance</i>			£0.00

Weekly contribution *Income - expenditure - age-related allowance* **£0.00**

! This tool gives you an indication of whether you are likely to need to make a financial contribution to the cost of your care and support. This is a GUIDE ONLY.
You should only submit your contribution calculation if you have had an Adult Social Care Needs Assessment and have been requested to do so by your Social Worker.

[Print](#) [Download](#)

9. You can also view a more detailed breakdown of the information that you have input and can amend this if necessary, by clicking on 'View Detailed Breakdown' and click on the section that you wish to amend.

Detailed breakdown

Savings and assets income [Change Savings](#)

[More information](#)

Item	Owner	Value	Note
Bank Account	You	£1,000.00	TSB
Bank Account	You	£150.00	Lloyds
Total savings and assets value		£1,150.00	
Total savings and assets income		£0.00	

Benefits income [Change](#)

Item	Owner	Value	Note
Disability Living Allowance (care) - High	You	£92.40	
Universal Credit	You	£100.00	
Total benefits income		£192.40	

10. At this point you can either print or download the summary if you are just using the OFA for a guide to your contribution costs.

11. If you have received or are about to receive an assessment from Adult Social Care, you can choose to submit this information, and this will be sent electronically to Social Care Financial Assessment Team (SCFAT).

12. You will be shown the 'Adult Social Care Financial Assessment Assessed Contribution Declaration' which will need to be read and agreed to, by clicking 'Yes', then continue.

Note: if you do not agree to this declaration, you will be unable to proceed with your online financial assessment.

Submit your statement

By submitting this statement you are agreeing to the Declaration below. Do you wish to submit your Contribution Calculation to us?

Yes No

Adult Social Care Financial Assessment Assessed Contribution Declaration

1. I confirm that the information I have given in my financial assessment is true and complete and I understand I must tell the Team as soon as possible if there are any discrepancies in the information I have provided, or if there are any changes to my financial circumstances;
2. I agree to pay my assessed financial contribution towards the cost of my agreed care and support plan under the Care Act 2014 which has resulted from my financial assessment;
3. I agree to send the Team details of any capital, benefits, or income I am in receipt of to help the Team process my financial assessment, if requested to do so;
4. I agree to let the Team know in writing, or by telephone about any changes in (my / our) financial, or personal circumstances that affect (my / our) income;
5. I understand that if I do not inform the Team of any such changes that any resulting increase in my maximum contribution, or assessed contribution to my agreed care and support plan due to changes will be backdated to the date that (my / our) personal, or financial circumstances changed;
6. I understand that should I fail to pay my assessed financial contribution towards the cost of my agreed care and support plan, or should any third party authorised on my behalf fail to pay such contributions then this could result in Sunderland City Council seeking to recover any unpaid charges, (the debt), through legal proceedings in the County Court;
7. I understand I am able to challenge my assessed financial contribution through the financial assessment review and appeal process operated by Sunderland City Council; and
8. I accept that the Team cannot guarantee that any benefit claims / challenges / actions they identify and assist with on my behalf will be successful.

Sunderland City Council is under a duty to protect the public funds it administers and to this end may use the information you have provided on this form for the prevention and detection of fraud. It may also share the information with other bodies responsible for auditing and / or administering public funds for these purposes. Please refer to our Privacy Notice for full details on why we need your personal information.

[Continue](#) [Print](#) [Download](#)

13. This will then take you to the General Data Protection Regulations (GDPR) information, where the customer/representative will need to agree to, by click yes.

Note: if you do not agree to the GDPR information, you will be unable to proceed with your online financial assessment.

Online Financial Assessment

< Disability expenditure

How we collect and use your data

When you visit the Online Financial Assessments (OFA) website, we collect personal information about you and where appropriate, the person you are representing. This may include name, address, email address, relationship to each other and details of financial self-assessments and social care finance documents.

Details recorded on the OFA website are passed to the relevant local authority for the purposes of statutory processing.

We use the information we collect for the purpose of identifying users returning to the OFA website, for example, to resume a partially completed assessment.

In accordance with the General Data Protection Regulation 2016 (GDPR), our legal basis for processing personal data and for passing personal data to the local authority is your consent. By selecting Yes below, you agree to the processing of your data for the purposes identified and to the communication of your data to the local authority.

Do you consent to us gathering, storing and using your personal information in this way?

Yes No

[More information](#)

14. You will then be taken to the 'Help us confirm your details' screen. In this section you can input a national insurance number (this helps to identify the customer when the details are submitted), however if the customer does not know this it can be left blank.

15. You can also upload any documents in this section, i.e bank statements, etc.

Online Financial Assessment

< Summary

Help us confirm your details

It will speed up the submission process if you give us the National Insurance number of the person whose financial information has been entered so that we can confirm the benefits received. You can also add documents as evidence.

What is the National Insurance number?


For example QQ 12 34 56 C

[Why do we need this?](#)

Add documents or photos

You can add scanned photos or documents as evidence of the details you have entered.

You must upload all documents you wish to be included with your Financial Assessment, as you will be unable to add this via this Portal at a later date. However, if there are documents that you wish to provide later or documents that we request they can be sent to us via email or post.



The maximum file size is 15MB

[Choose a file](#) or drag it here.

16. If you are uploading documents, you can do this using the 'Choose a File' option, which will take you to any documents you have saved on the device in your files/folders and select the applicable document or use the drag and drop option.

17. If you are completing the OFA on a Laptop/iPad etc. and you are taking a photo of your Bank Statement you can do this on your mobile phone:
- you would then need to transfer this photo to the device you are using to complete the OFA, by saving it to a drive accessible by the device
 - OR
 - you could email the document to yourself and open you emails on the device you are working on and 'drag' the document into the upload area.
18. You will then be taken to the Submit Screen. On this screen if the customer/representative has been advised to complete the OFA by a Social Worker, they will have been provided with a Reference Number, referred to as a Personal Identification Number (PID).
19. The customer/representative should input the PID in the Reference Number box. If the customer has not been provided with a PID then they can leave this blank.

Online Financial Assessment

< Additional details

Submit to your council

Are you submitting this form on behalf of someone else?

Yes No

[More information](#)

Reference Number (optional)

[More information](#)

[Continue](#)

20. The customer/representative will then be taken to the contact details screen. This must be completed in full to continue.

Your contact details

Please enter your contact details here.

First name

Last Name

Address

Building or street

Town or city

21. The customer/representative will then be asked to click submit.
22. The OFA will then be submitted, and the customer will receive the following:

Thank You

Your Local Authority will be in touch to arrange an appointment. We aim to contact you within 28 days of your Social Care Needs Assessment.

Preparing for your appointment

You will need to provide verification of all income, capital and expenditure, if you have not already provided this within the online financial assessment, please ensure that this is ready for when we contact you.

[Return to the OFA homepage](#)

NOTE:

The customer/representative will not receive any confirmation, other than the above, to confirm that the OFA has been sent.

This will have been received by Social Care Financial Assessment Team.