

CARERS FACT SHEET 6g

Carers Financial Assessment

If you and/or the person you care for receive a service from Health and Community Care or Children's Services and if you and/or they have an income you and/or they may be asked to make a financial contribution towards the cost of the service from your or their money.

The 'financial contribution' or charge will apply to people whose personal income exceeds a certain level. This level varies according to personal circumstances and it changes annually.

In order to calculate how much you will be charged, the Health and Community Care Department will carry out a 'financial assessment'

The following advice suggests some simple steps for you to follow to ensure you receive all your rights.

Procedure and rights

- If the service is for the person you care for:
 - only their income needs to be taken into account.
 - you do not have to produce any information about your personal income.
- You and/or the person you care for:
 - are entitled to a personal interview
 - are entitled to time to prepare beforehand
 - are entitled to have a friend or advocate to support you at the interview
 - are entitled to a copy of any previous financial assessment records before the next one
 - should define what disability related expenses apply
 - should define how much these cost
 - need to work out your total annual income both separately and together
 - need to work out your total annual disability related expenses (see over)
- When you are satisfied that you have recorded everything (all income and costs) you should request a personal interview from social services.
- You should have all the supporting records available at the interview and have a friend or advocate with you.



Disability Related Expenses

- The disability related expenses are for the person you care for and the disability related costs for the person you care for need to be identified and priced.
- There is no legally prescribed fully defined list and the Financial Assessment and Benefit (FAB) Team, who undertake the financial assessment will look at each persons expenses on an individual basis.
- Your expenses could be weekly, monthly, quarterly, or annually.
- You need to think about all the additional expenses that occur because of the disability or illness of the person you care for and/or for your own needs.
- You and/or the person you care for should define how much these cost
- Where possible, provide evidence of these expenses - you will be asked for this.

Some examples of disability related expenses which may be taken into account are shown below

- **Clothing:** purchase of clothing/footwear for 'extra wear and tear' as a result of disability
- **Carer cost:** additional costs of being accompanied by a carer or personal assistant to a meeting or event etc if privately paid for
- **Domestic Support:** cleaning, shopping, cooking etc. if paid for privately
- **Emotional Support Needs:** related to your disability, if paid for privately
- **Equipment Maintenance:** e.g. wheelchair repairs, new batteries, specialist equipment repairs, regular servicing of equipment related to your disability
- **Extra Heating Costs:** for disabled people under 60
- **Food:** special dietary requirements for medical reasons
- **Gardening:** if it is paid for privately
- **Incontinence:** pads, aids, laundry, replacement bedding
- **Lifeline/alarm:** if purchased privately
- **Personal Care:** if arranged privately
- **Purchase of Equipment:** needed because of a disability and not funded by a grant e.g. powered bed, hoist, wheelchair, stair lift etc
- **Respite Care:** if arranged privately
- **Social Support Needs:** if a personal assistant is required to help with social support and you pay privately
- **Transport Costs:** if not covered by Disability Living Allowance mobility component