



Gloucestershire  
COUNTY COUNCIL

# Online Financial Assessment

## Visual Guidance

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• • • •



# Landing Page



Gloucestershire County Council

Your Circle

Login to OFA

Online Financial Assessment

## Calculate your contribution

This easy-to-use, online calculator will help you find out how much you might have to pay for care and support arranged by Gloucestershire County Council.

The information you enter on the online financial assessment will not be sent to Gloucestershire County Council, unless you choose to submit at the end of the online financial assessment.

If the council provides you with adult social care services, you will need to complete a financial assessment to work out how much you need to pay towards the cost of your care. We only assess the financial situation of the person that is receiving care. Our Online Financial Assessment calculator allows you or your representative to supply your financial details online.

Paying for care can use up savings quickly so it is always a good idea to take independent financial advice before making any decisions. You can find information on independent financial advice on the [Your Circle](#) website. Look at Money Matters and Benefits and choose Paying for Care.

Create an account!  
If you want to **submit** your form or be able to save and come back to it, it is important that you create an account.

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## Secure login - step 1

New to Gloucestershire County Council Social Care Portal? [Register for an account here](#) or use the button below.  
Already using Gloucestershire County Council Social Care Portal? Sign in below.

If you have already created an account, you can log in here

Existing users

Email

Password

For additional security, we will confirm your account by sending an authentication code to your email address.

Submit

Cancel

[Forgotten password?](#)

If you have forgotten your password, you can click here to reset it

New users

If you're new to Gloucestershire County Council Social Care Portal, sign up for an account here

[Register for new account](#)

Click here to create an account

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## Secure login - step 2

We have just sent you an email to confirm your account. Please enter the code this contains below.

If you can't find this email, it may be in your spam/junk email folder.

Code

Finish

Cancel

[Please send me a new code](#)

Please enter the verification code that we sent you.

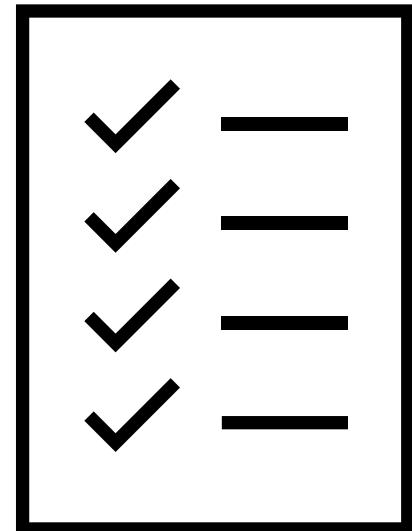
As part of logging in you will be asked to confirm your account by entering a code which will be sent to your email address. Please enter the code here

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# Before you start the assessment, you will need to gather documents with the details of the following:

- 12 months of bank statements for each bank account or building society that contains your name
- Savings, investments, or other capital
- any benefits you receive, for example, Disability Living Allowance (DLA), Personal Independence Payment (PIP), Attendance Allowance (AA), Universal Credit, or any other benefits
- Income (earnings, your state or occupational pensions)
- details of essential expenditure, such as council tax, water rates, rent, mortgage
- Disability related costs (money you spend due to your condition or disability)
- National Insurance Number



You will also need to submit evidence of these documents at the end of the assessment



# Do you have your evidence to hand?



- If you want to submit the online financial assessment, you will need to provide evidence of the income, benefits, savings and expenses that you enter within the assessment
- You will be able to upload your evidence at the end of the assessment
- You will need to make sure that your evidence is saved on your device (computer, laptop etc)
- Evidence can include scanned copies, photos of documents or electronic versions.
- **You can save your assessment and come back to it if needed, as long as you have created an account.**

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# Selecting the correct type of care

Choose the assessment type based on the care/support you are receiving

## Non-residential services

This covers various types of care that you might receive while living at home or in the community, including Short Break Care (Respite Care).

The Non-Residential Calculator can also be used as a tool to submit your information to Gloucestershire County Council for the purposes of Short Break (Respite) assessments.

If using the calculator for this purpose, then please note the calculation outcome given at the end will not represent any potential charge for Short Break (Respite); as this charge will have to be manually calculated by the financial officer once the information has been submitted. The outcome at the end will only represent any potential Non-Residential charge.

The Non-Residential calculator will estimate what your weekly contribution might be if Gloucestershire County Council arranges your care and support.

[Calculate my non-residential contribution](#)

## Residential services

This covers permanent residential and nursing care. It does not calculate contributions for temporary placements.

The residential calculator will estimate what your weekly contribution might be if Gloucestershire County Council arranges your care and support.

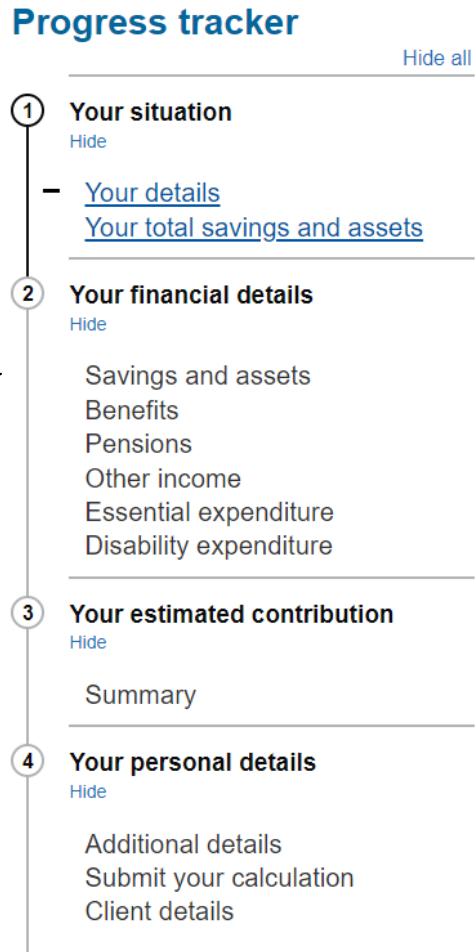
[Calculate my residential contribution](#)

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# Progress tracker

This shows the different sections within the online financial assessment. It will highlight in blue on the current section you are on



Continue

When you have completed a section, press the continue button to proceed to the next section

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# Your Age

## Your age

What is your date of birth?

For example: 31 3 1970

Day      Month      Year

 [Why do we need this?](#)

**Continue**



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# Your total savings and assets

You will be asked, Not counting your own home, do you have savings and assets over £23,250?

My total savings and assets are over the limit

You will need to pay for the full cost of your services. There is no need to provide any further details unless you want to. If your savings and assets are not far over the limit above, you may want to carry on to calculate what your contribution would be based on your other details.

If you are not sure if your savings and assets are over the limit above, or if you want to find out whether the kind of savings and assets you have are taken into account when calculating your contribution, carry on to enter details of your savings and assets.

## Your total savings and assets

Depending on the value of your savings, you may not need to carry out the full calculation.

Not counting your own home, do you have savings and assets over £23,250?

Yes  No

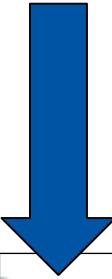
 [Why do we need this?](#)

[Continue](#)

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# Please complete the remaining relevant sections



**2 Your financial details**

[Hide](#)

Savings and assets  
Benefits  
Pensions  
Other income  
Essential expenditure  
Disability expenditure

Please ensure that  
you add comments  
where required

**Bank Account**

You will need to add an item / comment for each account held. Click on additional item to add more accounts. Use the comments box to record the name of the bank, the last four digits of the account number and the date of the balance you are adding. For example, Lloyds \*\*\*\*1234 13/04/2024. Please note: If the account is overdrawn, enter the value as £0.00 in the amount box and enter the actual overdrawn balance in the comments box.

Amount:  Owner:  Mine  Joint

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

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# Adding comments

## Bank Account

You will need to add an item / comment for each account held. Click on additional item to add more accounts. Use the comments box to record the name of the bank, the last four digits of the account number and the date of the balance you are adding. For example, Lloyds \*\*\*\*1234 13/04/2024. Please note: If the account is overdrawn, enter the value as £0.00 in the amount box and enter the actual overdrawn balance in the comments box.

Amount: Owner:

£  Mine  Joint

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



Please ensure that  
you add comments  
where required

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## Bank Account

You will need to add an item / comment for each account held. Click on additional item to add more accounts. Use the comments box to record the name of the bank, the last four digits of the account number and the date of the balance you are adding. For example, Lloyds \*\*\*\*1234 13/04/2024. Please note: If the account is overdrawn, enter the value as £0.00 in the amount box and enter the actual overdrawn balance in the comments box.

Amount: Owner:

£ 1234  Mine  Joint

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

Lloyds \*\*\*\*1234 09/10/2024.



# I want to save my form and come back to it.

In each sub-section of Section 2, 'Your Financial Details', there is a 'Save for later' button at the bottom of each page

2 Your financial details  
[Hide](#)

- Savings and assets
- Benefits
- Pensions
- Other income
- Essential expenditure
- Disability expenditure

[Continue](#) [Save for later](#)



You **MUST** be logged in for the 'save for later' button to appear.

# Your result

Once you have completed Section 2 'Your financial details', you can review the details you have entered and amend any if needed.

## Your result

We calculate your maximum contribution will be:

# £69.40 weekly

[!\[\]\(f024d36410e36011059c73f7d7908105\_img.jpg\) How did we calculate this?](#)

### Calculation Summary

[View Detailed breakdown](#)

#### Weekly income

Savings and assets income	£0.00
Benefits	£72.65
Pensions	£100.00
Other income	£100.00
<b>Total income</b>	<b>£272.65</b>

#### Weekly expenditure

Essential expenditure	£0.00
Disability expenditure	£20.00
<b>Total expenditure</b>	<b>£20.00</b>



This calculator gives you an indication of how much you are likely to have to pay towards the full cost of your care and support. The result is an estimate based on the information you have entered. The actual amount that Gloucestershire County Council asks you to pay may be different after a full financial assessment.

The estimate is valid on the day that you entered the information and this may change over time.

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# Submitting your assessment

To submit your assessment, you need to scroll down the page below, 'Your result'

## What next?

If you wish to submit your online financial assessment, please scroll to the bottom of the page and click continue.

If you have used the online financial assessment calculator to give you an estimate and do not wish to submit at this time, please note the following:

- To find out if you are eligible for means tested support from the council . You will need to have a care needs assessment and a financial assessment.
- There are details of how to contact the council on [Your Circle](#).
- You have the right to refuse a financial assessment.
- If you do not want a financial assessment, or if you know you will not qualify for financial help, you will have to pay the full amount.
- Paying for care can use up savings quickly so it is always a good idea to take independent financial advice before making any decisions.
- You can find information on independent financial advice on the [Your Circle](#) website. Look at Money Matters and Benefits and choose Paying for Care.

Submit your details to us

Continue

Print a breakdown of the details you have entered

Print

Download

Download a breakdown of the details you have entered

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# Choose to consent to us gathering, storing and using your personal information

## 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

If you select no, the financial assessment will not be submitted to Gloucestershire County Council

We only gather and use the minimum amount of personal information that is needed to make a financial assessment. We cannot complete a financial assessment without using your information in this way, so you can only proceed if you consent to us using your information. For more information about how the council uses your personal information please visit the council's privacy notices on our website:

<https://www.goucestershire.gov.uk/council-and-democracy/data-protection/service-specific-privacy-notices/>

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# Help us confirm your details

Please enter your national insurance number.

Without it, it will take us longer to complete your assessment.

We are obligated to check that you are getting all the benefits you are entitled to.

If you have your National Health Service (NHS) number, you can enter this here.

What is the National Insurance number?

For example QQ 12 34 56 C

 [Why do we need this?](#)

We can use your National Insurance number to confirm the benefits you receive.

What is the National Health Service number?

For example 123-123-1234

 [Why do we need this?](#)

We can use your National Health Service number to confirm the benefits you receive.

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# Upload your evidence

## Add documents or photos

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



The maximum file size is 15MB  
[Choose a file](#) or drag it here.



[Continue](#)

[Save for later](#)

Without relevant evidence we cannot complete your financial assessment.

You can save the form at this stage and come back to it.

The next page details how you can upload evidence.

This can include scanned copies, electronic documents or photos of documents.

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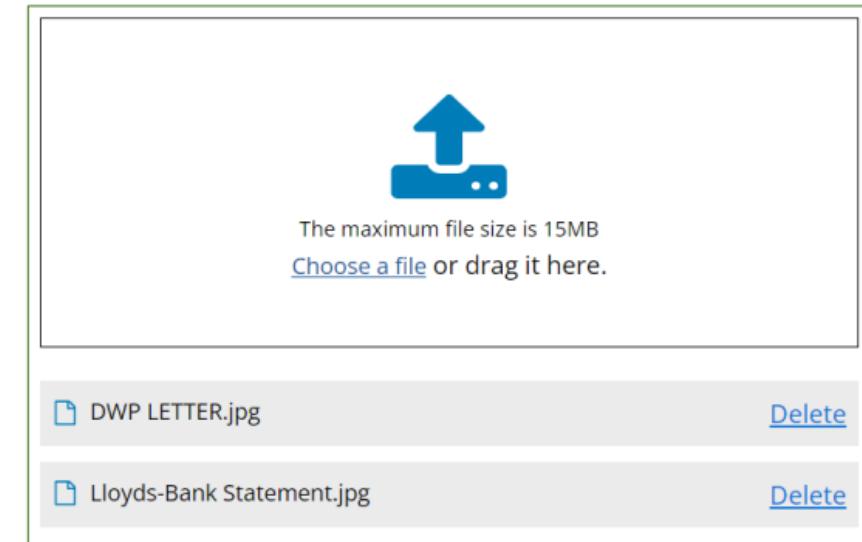
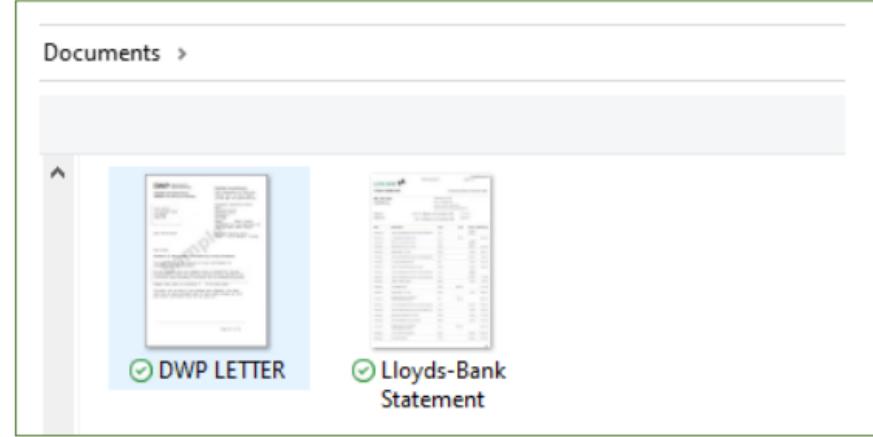
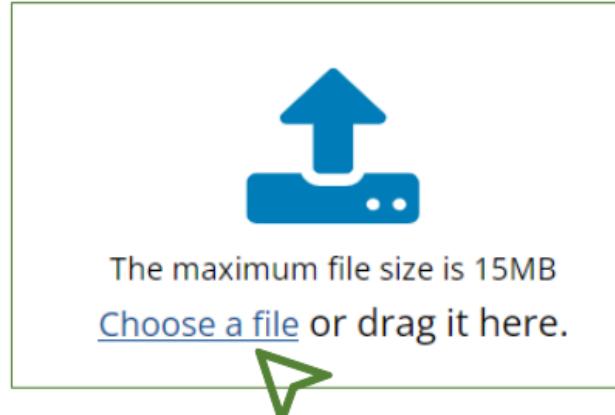


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# Who is submitting this form?

## Submit to your council

Are you submitting this form on behalf of someone else?

Yes  No

 [More information](#)

Reference Number (optional)

 [More information](#)

[Continue](#)

Select the correct box and you will be directed to enter relevant contact details.

If you select Yes, and you are submitting this calculation on behalf of someone we will need additional information about you.

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Once you have completed the contact details section you can press submit!



Submit

## Thank You

Thank you for submitting your Online Financial Assessment. A member of the Financial Assessments and Benefits team will be in touch regarding this assessment. We will contact you should we require further evidence.

[Return to the homepage](#)

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