

**PROPOSED FINANCIAL ASSESSMENT METHODOLOGY CHANGES**  
**Examples Of The Impact On Customers In Different Circumstances**

Scenario 1

Mrs T owns her home. She has £150.00 retirement income per week, and housing costs of £12.00. Her disability related costs are £5.91 per week. She also has £20,000 in savings. She receives 10 hours of home care each week.

**Current**

Maximum assessed weekly contribution	Nil
Charge based on level of service	£130.00
Actual customer contribution per week	Nil

**Proposed**

Maximum assessed weekly contribution	Nil
Charge based on level of service	£130.00
Actual customer contribution per week	Nil

Mrs T currently has no contribution to make towards her home care service and that will not change with the proposed changes to the financial assessment methodology.

Scenario 2

Mr Y aged 35 lives with his parents. He has £110.85 Incapacity Benefit and £77.45 Disability Living Allowance care component. He also receives £54.05 mobility component. He has no housing costs but has disability related costs of £5.00 per week. He attends a day service for people with learning disabilities 5 days a week and receives transport there and back.

**Current**

Maximum assessed weekly contribution	£11.27
Charge based on level of service	£235.00
Actual customer contribution per week	£11.27

**Proposed**

Maximum assessed weekly contribution	£12.52
Charge based on level of service	£235.00
Actual customer contribution per week	£12.52

Potential increased payment per week	£1.25
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Mr Y would pay £12.52 per week towards his services with the proposed changes to the financial assessment methodology. After paying this charge he will still have £229.83 (95% of total income) per week available to him to pay for other living costs including his disability related expenditure.

### Scenario 3

Mrs S is over state pension age and owns her home. She has £200.00 in retirement income per week, and £77.45 high rate Attendance Allowance. She also has savings of £20,000. She has £13 per week housing costs and has disability related costs of £25 per week. She attends a day centre 2 days each week and receives transport there and back.

#### **Current**

Maximum assessed weekly contribution	£42.72
Charge based on level of service	£58.00
Actual customer contribution per week	£42.72

#### **Proposed**

Maximum assessed weekly contribution	£58.47
Charge based on level of service	£58.00
Actual customer contribution per week	£58.00
Potential increased payment per week	£15.28

Mrs S would pay £58.00 per week towards her day care service. After paying this charge and her housing costs she will still have £206.45 (74% of total income) per week available to her to pay for other living costs including her disability related expenditure, plus £20,000 in savings.

### Scenario 4

Mrs H is over state pension age and owns her home. She has £235.15 retirement income per week and £77.45 Attendance Allowance. She has £32.96 housing costs. She also has £60,000 in savings. She receives 12 hours of home care each week.

Current charge for services	£156.00
Actual customer contribution	£156.00
Proposed charge	£156.00
Actual customer contribution from client	£156.00

Mrs H currently pays £156.00 per week towards her home care service and that will not change with the proposed changes to the financial assessment methodology. After paying this charge and her housing costs she will still have £123.64 (40% of total income) per week available to her to pay for other living costs including any disability related expenditure, plus £60,000 in savings.