



Nottingham

City Council

**Nottingham City Council
Online Financial Assessment User Guide**

Contents

Overview..... 3

Mobile -

Accessing the Online Financial Assessment 4

Completing your Online Financial Assessment 6

Saving your Online Financial Assessment 9

Retrieving your saved Online Financial Assessment11

Downloading your Online Financial Assessment Summary 13

Submitting your Online Financial Assessment 14

Desktop -

Accessing the Online Financial Assessment 19

Completing your Online Financial Assessment 21

Saving your Online Financial Assessment 24

Retrieving your saved Online Financial Assessment 26

Downloading your Online Financial Assessment Summary 28

Submitting your Online Financial Assessment 29

Overview

This guide refers to the Online Financial Assessment tool on the Nottingham City Council Adult Social Care Hub and its functions.

This document will provide guidance for accessibility on both mobile and desktop. Please use the contents page above to navigate to your preferred device guidance.

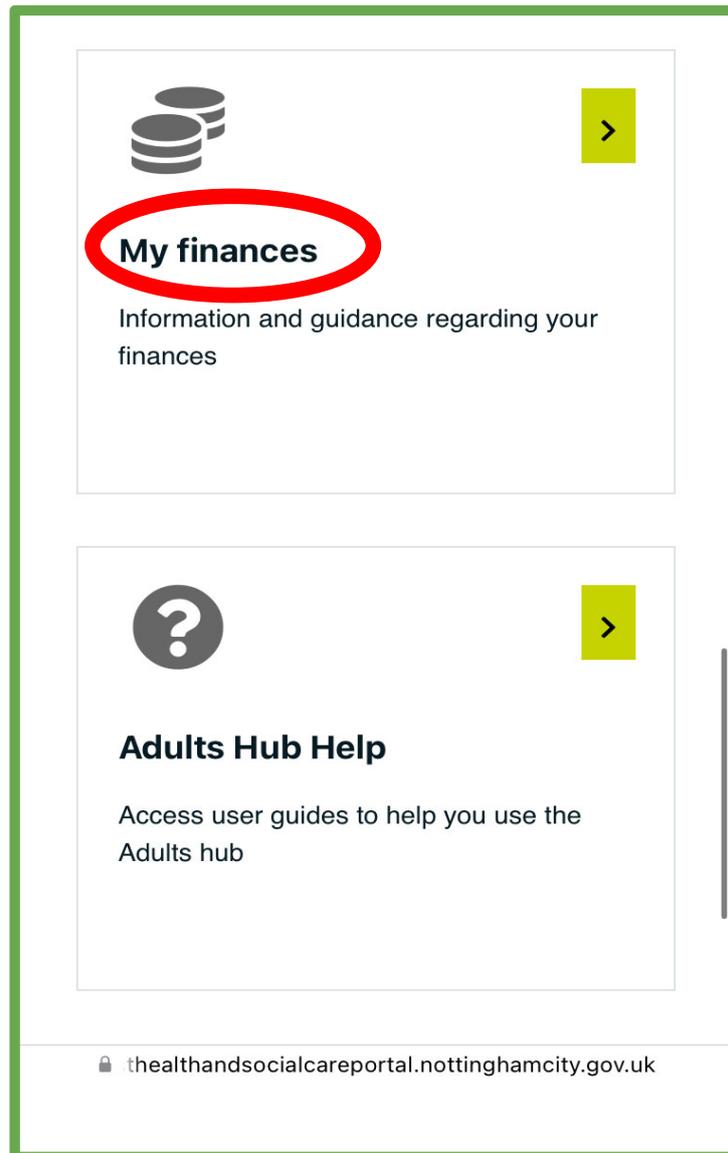
To make sure the information you send to us is secure, you will need to log into your account every time that you submit your information via the Hub.

If you will be unable to complete the Online Financial Assessment in one sitting, you can utilize the 'Save for later' feature. Please be aware you must be logged into your Nottingham City Council Adult Social Care Hub account to use this feature.

Accessing the Online Financial Assessment - Mobile

The Online Financial Assessment can be accessed from the Adults Social Care Hub by following the steps below:

Step 1 - Select the **'My finances'** tile.



Step 2 - Select the 'Online financial assessments' tile.

Following the steps above, you will have navigated to the Online Financial Assessment webpage. Here you can find Frequently Asked Questions (FAQs) under the 'Find out more' section.

The screenshot displays a webpage layout with two main columns. The left column contains two large tiles. The top tile, titled 'Charging for care and support', features a house icon and a right-pointing arrow. The bottom tile, titled 'Online financial assessments', features a calculator icon and a right-pointing arrow. The right column is titled 'Find out more' and contains a list of seven FAQ items, each in a yellow-bordered box with a dropdown arrow on the right. Red circles highlight the 'Find out more' title and the 'Online financial assessments' tile title.

Charging for care and support
Find out information about charging for care and support

Online financial assessments
Find out how much you might have to pay towards your social care

Find out more

- What is the Online Contribution Calculator?
- Who is it for?
- What information will I need?
- What kinds of care does the calculation cover?
- How is the contribution for care at home or in a residential home calculated?
- Does it matter where I live?
- Will my local authority or the government see what I enter here?

Completing your Online Financial Assessment - Mobile

Step 1 - Once ready to begin completing your Online Financial Assessment, select '**Calculate my contribution**'.

The Online Contribution Calculator lets you do this yourself. All you need to do is enter details of your benefits, pensions, savings, assets and your essential costs. For more details click 'What Information will I need?' below.

If you are using this tool to obtain an estimate but have not yet completed a formal care assessment with a Social Care Practitioner, please do not submit your information to us. You should only submit your details once you are accepting a package of care and support.

You will be able to print the estimated charge that displays. This will show you all of the information that you have entered.

Calculate my contribution

Find out more

What is the Online Contribution Calculator?



Step 2 - Select the appropriate type of care required by selecting either '**Calculate my non-residential**' contribution or '**Calculate my residential contribution**'.

weekly contribution towards these services might be:

Calculate my non-residential contribution

Residential services

This covers care that you might receive in the following settings;

- **Residential Care Homes**
- **Nursing Care Homes**

This includes all types of stays in care such as respite, short term or long term care. Use this calculator to find out what your weekly contribution towards these services might be:

Calculate my residential contribution

Step 3 - Follow the steps within the assessment, entering information relevant to you or the person you are completing the assessment on behalf of.

The progress of your assessment can be tracked using the '**Progress Tracker**' at the bottom of the webpage.

The screenshot shows a mobile assessment interface. At the top, there is a navigation bar with a back arrow, the text 'Assessment type', and a forward arrow. Below this is the title 'Your age' and a subtitle 'Your total savings and assets'. The main question is 'What is your date of birth?' with an example '31 3 1970'. There are three input fields for Day, Month, and Year. Below the fields is an information icon and the text 'Why do we need this?'. A yellow 'Continue' button is positioned below the information text. At the bottom of the form, a 'Progress tracker' label is circled in red. Below the tracker, there is a 'Hide all' link and a list of sections: '1 Your situation' (with a 'Hide' link), 'Your details', and 'Your total savings and assets'.

Once you have completed all 4 sections of the assessment you will be provided with an **estimated** maximum contribution you may have to pay towards your care.

Saving your Online Financial Assessment - Mobile

Please note that you must be logged in to your Hub Account to use this feature. The assessment will be saved and available to access for 30 days, after this time if you have not submitted the assessment, the assessment will no longer be available and any information you previously completed will be lost.

Step 1 - If you have started the Online Financial Assessment but are unable to complete it, you are able to save your progress by selecting the **'Save for later'** button at the bottom of the webpage.

This item will not be included in providing an estimate of your charge, but could be included later depending on the nature of the savings

Amount: Owner: Mine Joint

This item will *not* be included when we calculate your contribution.

i More Information **+** Comment
+ Additional item

Continue

Save for later

Progress tracker

Hide all

1 Your situation

Step 2 - Upon clicking this you will need to agree to your information being collected, and asked to provide your name before selecting **'Save'**.

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

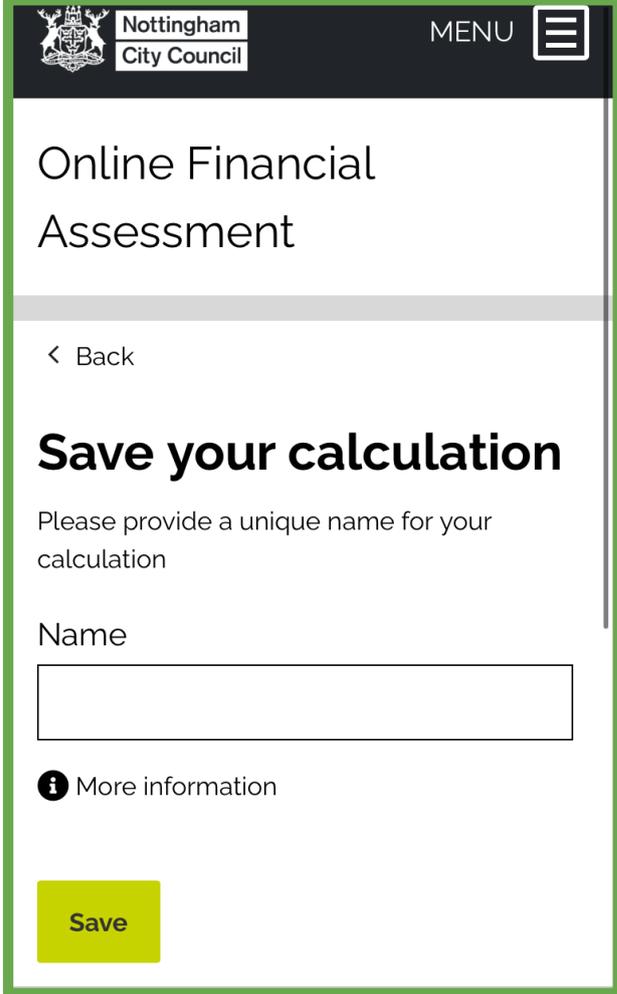
We use the information we collect for the purpose of identifying users returning to the OFA website, for example, to resume a partially completed assessment.

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

i More information



The screenshot shows the Nottingham City Council logo and 'MENU' button at the top. The main heading is 'Online Financial Assessment'. Below it is a 'Back' link. The primary action is 'Save your calculation', followed by a prompt to 'Please provide a unique name for your calculation'. There is a text input field for the name, an 'i More information' link, and a yellow 'Save' button at the bottom.

You can now either exit the assessment and access later, or continue with the submission.

Retrieving your saved Online Financial Assessment - Mobile

To retrieve your assessment, you will be required to log in to the Hub. For guidance on this, visit the **'Registering for a portal account'** guidance document within the **'Adults Hub Help'** section of the Adults Social Care Hub.

Step 1 - Once logged in, navigate back to the Online Financial Assessment webpage (see pages 4-5) and select the **'Open your saved calculations'** button at the bottom of the webpage. Any assessments you have saved will appear here, along with the date they were saved.

Residential services

This covers care that you might receive in the following settings;

- **Residential Care Homes**
- **Nursing Care Homes**

This includes all types of stays in care such as respite, short term or long term care. Use this calculator to find out what your weekly contribution towards these services might be:

[Calculate my residential contribution](#)

Open a saved calculation

If you saved an incomplete calculation you can continue working on it.

[Open your saved calculations](#)

Step 3 - Select an option to either delete or open the saved assessment.

Nottingham City Council

MENU

Adults Social Care
Logout

Online Financial Assessment

< Assessment type

Select a saved calculation

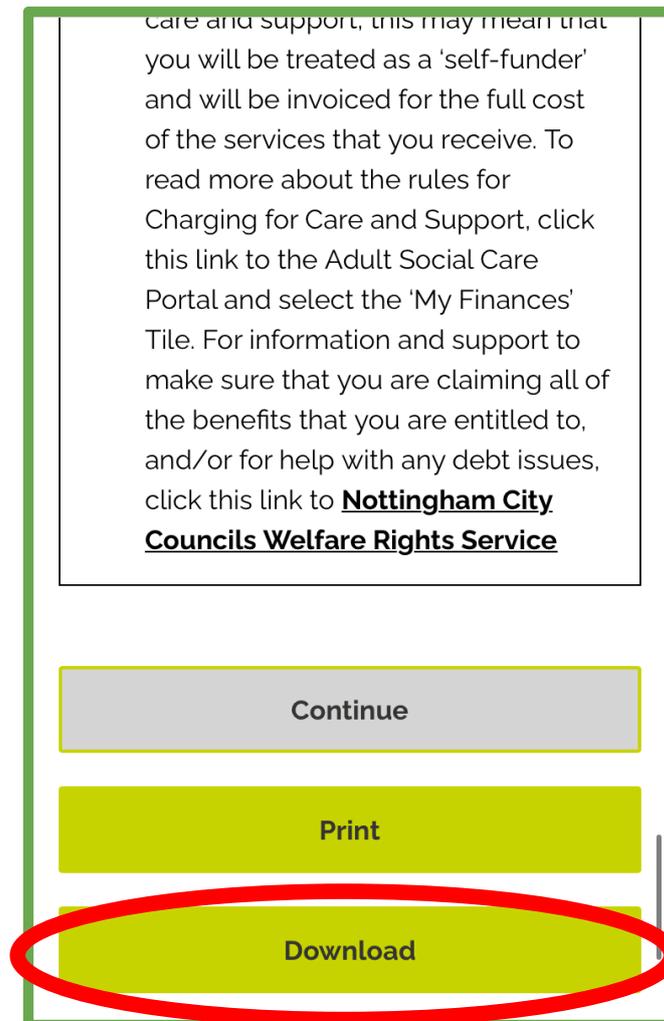
Save 1 - NON RESIDENTIAL -
16/11/2023
Incomplete
Delete
Open

Downloading your Online Financial Assessment Summary - Mobile

When you have completed all sections of the Online Financial Assessment, you will be provided with the summary page with an **estimated** maximum contribution you may have to pay towards your care. You will also be able to view an extended breakdown of your income and expenditure based on the information you have provided throughout the assessment.

At this stage you may wish to submit your assessment (see pages 14-18), however this is not compulsory. Instead, you have the option to download your Online Financial Assessment Summary.

If you wish to download your Online Financial Assessment Summary, scroll to the bottom of the webpage and select the '**Download**' button.



Submitting your Online Financial Assessment - Mobile

Should you wish to submit the Online Financial Assessment, you will first need to have a registered Nottingham City Council Hub account. For guidance on this, visit the **'Registering for a portal account'** guidance document within the **'Adults Hub Help'** section of the Adults Social Care Hub.

Step 1 - Once you have reached the Online Financial Assessment Summary, scroll to the bottom of the webpage, read and agree with the declaration. Once complete, select **'Continue'**.

Declaration

I confirm that the details provided for the purposes of this financial assessment are true and accurate and that to the best of my knowledge, all income and capital assets have been declared. I understand that I have an obligation to inform Nottingham City Council immediately of any change in circumstances financial or otherwise that may affect the amount of my assessed charge or my ability to pay any contribution that may be due.

Do you agree?

Yes No

i If you select no, you will not be able to submit your financial information. If you are required to make a contribution towards the cost of your care and support, this may mean that you will be treated as a 'self-funder' and will be invoiced for the full cost of the services that you receive. To

Step 2 - Enter your National Insurance Number and upload any supporting evidence regarding your finances. Once complete, select **'Continue'**.

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.



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

Continue

Step 3 - Select whether you are completing the Online Financial Assessment on behalf of someone else, or completing it for yourself. There is also an option that enables you to enter your council reference number which should be on supporting documentation (this is not necessary for submission). Once complete select '**Continue**'.

Submit to your council

Are you submitting this form on behalf of someone else?

Yes No

i More information

Reference Number (optional)

i More information

Continue

Progress tracker

[Hide all](#)

1 **Your situation**
Hide

Step 4 - If you are completing the Online Financial Assessment on your own behalf, enter your personal details here. Once complete, select '**Submit**'.

If you are completing the Online Financial Assessment on behalf of someone else, skip to Step 5.

Online Financial Assessment

[← Submit your calculation](#) [Client details →](#)

Your contact details

We will contact you about this submission. Please enter your contact details here. On the next page, you will enter the details of the person whose financial information has been used in the calculation

First name (required)

Last name (required)

Postcode lookup

Step 5 - If you are completing the assessment on behalf of someone else, enter their personal details here. Once complete, select **'Submit'**.

Details of the person in the submission

Please enter details of the person whose financial information has been used in the calculation.

First name (required)

Last name (required)

Postcode lookup

Enter the postcode to lookup the address

Lookup

Accessing the Online Financial Assessment - Desktop

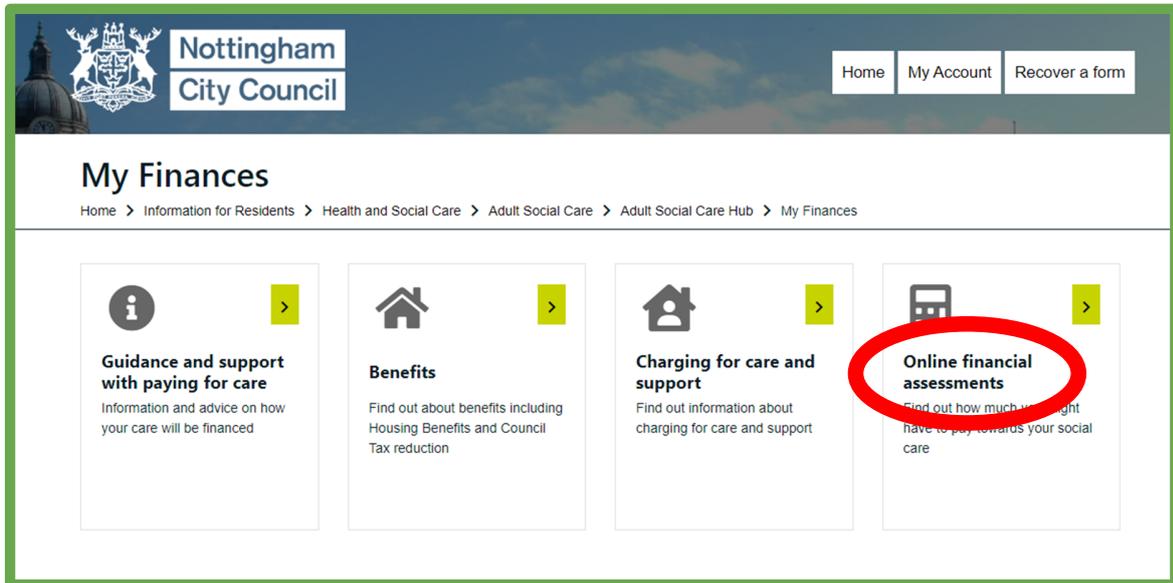
The Online Financial Assessment can be accessed via the following link: [Online Financial Assessment](#)

Alternatively, the Online Financial Assessment can be accessed from the Adults Social Care Hub by following the steps below:

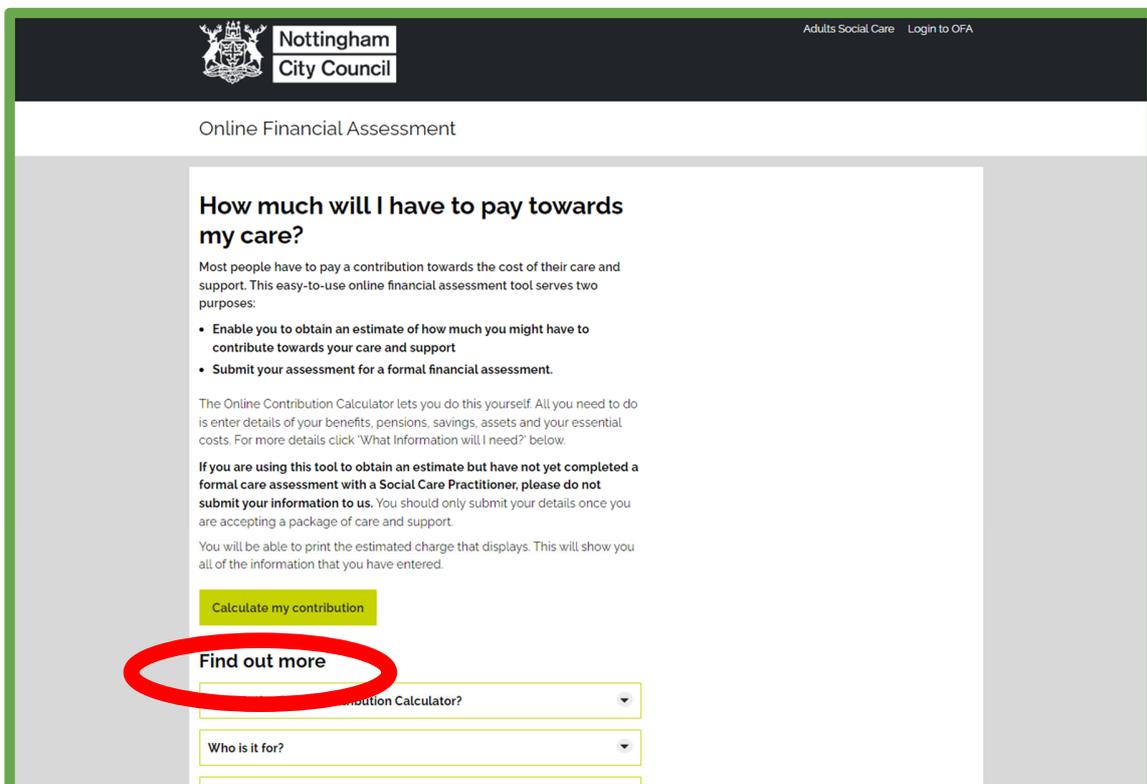
Step 1 - Select the 'My finances' tile.

The screenshot shows the Nottingham City Council Adult Social Care Hub website. The header includes the Nottingham City Council logo and navigation links for Home, My Account, and Recover a form. The main heading is "Welcome to Nottingham City Council's Adult Social Care Hub" with a breadcrumb trail: Home > Information for Residents > Health and Social Care > Adult Social Care > Adult Social Care Hub. Below this is the sub-heading "Your Information Hub for Adult Social Care". The main content area features seven tiles, each with an icon, a title, and a brief description. The "My finances" tile, which includes a stack of coins icon and the text "Information and guidance regarding your finances", is circled in red. The other tiles are: "Accessing my community" (information and advice), "Safeguarding" (risk of abuse), "Your care and support needs" (self-assessment), "Professionals and providers" (support for professionals), "Your needs as a carer" (support for carers), and "Adults Hub Help" (user guides).

Step 2 - Select the 'Online financial assessments' tile.



Following the steps above, you will have navigated to the Online Financial Assessment webpage. Here you can find Frequently Asked Questions (FAQs) under the 'Find out more' section.



Completing your Online Financial Assessment - Desktop

Step 1 - Once ready to begin completing your Online Financial Assessment, select 'Calculate my contribution'.

Nottingham City Council

Adults Social Care Login to OFA

Online Financial Assessment

How much will I have to pay towards my care?

Most people have to pay a contribution towards the cost of their care and support. This easy-to-use online financial assessment tool serves two purposes:

- Enable you to obtain an estimate of how much you might have to contribute towards your care and support
- Submit your assessment for a formal financial assessment.

The Online Contribution Calculator lets you do this yourself. All you need to do is enter details of your benefits, pensions, savings, assets and your essential costs. For more details click 'What Information will I need?' below.

If you are using this tool to obtain an estimate but have not yet completed a formal care assessment with a Social Care Practitioner, please do not submit your information to us. You should only submit your details once you are accepting a package of care and support.

You will be able to print the estimated charge that displays. This will show you the information that you have entered.

Calculate my contribution

Find out more

What is the Online Contribution Calculator? ▾

Who is it for? ▾

Step 2 - Select the appropriate type of care required by selecting either '**Calculate my non-residential**' contribution or '**Calculate my residential contribution**'.

Online Financial Assessment

< Start Your details >

What type of care do you need?

Different rules will be used to calculate your contribution, depending on the type of care.

Care in my home and in my community

This covers various types of care that you might receive whilst living at home in the community - either as a tenant, owner occupier or living with family, for example:

- **Direct Payments** - this is a payment to you that gives you the opportunity to arrange your own care and support.
- **Home Care** - this helps you in your own home with activities of daily living such as washing and dressing.
- **Day Centres** - this gives you the opportunity to meet others socially and take part in activities in a supportive and safe environment.
- **Independent Living Support** - this gives you practical support to maintain your home, attend appointments, manage your money and engage in social activities.
- **Supported Living** - this provides accommodation where care and support services are based alongside you to help with living independently.

Use this calculator to find out what your weekly contribution towards these services might be.

Calculate my non-residential contribution

Residential services

This covers care that you might receive in the following settings:

- **Residential Care Homes**
- **Nursing Care Homes**

This includes all types of stays in care such as respite, short term or long term care.

Use this calculator to find out what your weekly contribution towards these services might be.

Calculate my residential contribution

Step 3 - Follow the steps within the assessment, entering information relevant to you or the person you are completing the assessment on behalf of.

The progress of your assessment can be tracked using the '**Progress Tracker**' on the right hand side of the webpage.

Nottingham City Council

Adults Social Care Login to OFA

Online Financial Assessment

< Assessment type Your total savings and assets >

Your age

What is your date of birth?
For example: 31 3 1970

Day Month Year

i Why do we need this?

[Continue](#)

Progress tracker

- 1 Your situation**
Hide
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

Once you have completed all 4 sections of the assessment you will be provided with an **estimated** maximum contribution you may have to pay towards your care.

Saving your Online Financial Assessment - Desktop

Please note that you must be logged in to your Hub Account to use this feature. The assessment will be saved and available to access for 30 days, after this time if you have not submitted the assessment, the assessment will no longer be available and any information you previously completed will be lost.

Step 1 - If you have started the Online Financial Assessment but are unable to complete it, you are able to save your progress by selecting the **'Save for later'** button at the bottom of the webpage.

Additional savings and assets

Savings and assets items in this section are *not* likely to be included when we calculate your contribution. However, please provide details below so that we can confirm how these will be treated.

Personal Injury Compensation

Please enter the amount of any Personal Injury Compensation you have been awarded. Evidence of this will be required to verify if it is to be included as part of the financial assessment. This item will not be included in providing an estimation of your charge, but could be included later depending on the nature of the compensation.

Amount: Owner: Mine Joint

This item will *not* be included when we calculate your contribution.

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

Trust Fund Savings

This item will not be included in providing an estimate of your charge, but could be included later depending on the nature of the savings

Amount: Owner: Mine Joint

This item will *not* be included when we calculate your contribution.

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

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

Step 2 - Upon clicking this you will need to agree to your information being collected, and asked to provide your name before selecting **'Save'**.

The screenshot shows the Nottingham City Council logo and navigation links 'Adults Social Care' and 'Logout' in the top right. The page title is 'Online Financial Assessment'. Below a '< Back' link is the heading 'How we collect and use your data'. The text explains that personal information is collected for statutory processing and user identification. It states that by selecting 'Yes', users consent to data processing. At the bottom, there are two radio buttons: 'Yes' and 'No'. Below them is a link for 'More information'.

The screenshot shows the Nottingham City Council logo and navigation links 'Adults Social Care' and 'Logout' in the top right. The page title is 'Online Financial Assessment'. Below a '< Back' link is the heading 'Save your calculation'. The text asks the user to provide a unique name for their calculation. There is a text input field labeled 'Name'. Below the field is a link for 'More information'. At the bottom left, a yellow 'Save' button is circled in red.

You can now either exit the assessment and access later, or continue with the submission.

Retrieving your saved Online Financial Assessment - Desktop

To retrieve your assessment, you will be required to log in to the Hub. For guidance on this, visit the **'Registering for a portal account'** guidance document within the **'Adults Hub Help'** section of the Adults Social Care Hub.

Step 1 - Once logged in, navigate back to the Online Financial Assessment webpage (see pages 19-20) and select the **'Open your saved calculations'** button at the bottom of the webpage. Any assessments you have saved will appear here, along with the date they were saved.

The screenshot displays a webpage with the following content:

- Supported Living** - this provides accommodation where care and support services are based alongside you to help with living independently.

Use this calculator to find out what your weekly contribution towards these services might be:

[Calculate my non-residential contribution](#)

Residential services

This covers care that you might receive in the following settings:

- Residential Care Homes**
- Nursing Care Homes**

This includes all types of stays in care such as respite, short term or long term care.

Use this calculator to find out what your weekly contribution towards these services might be:

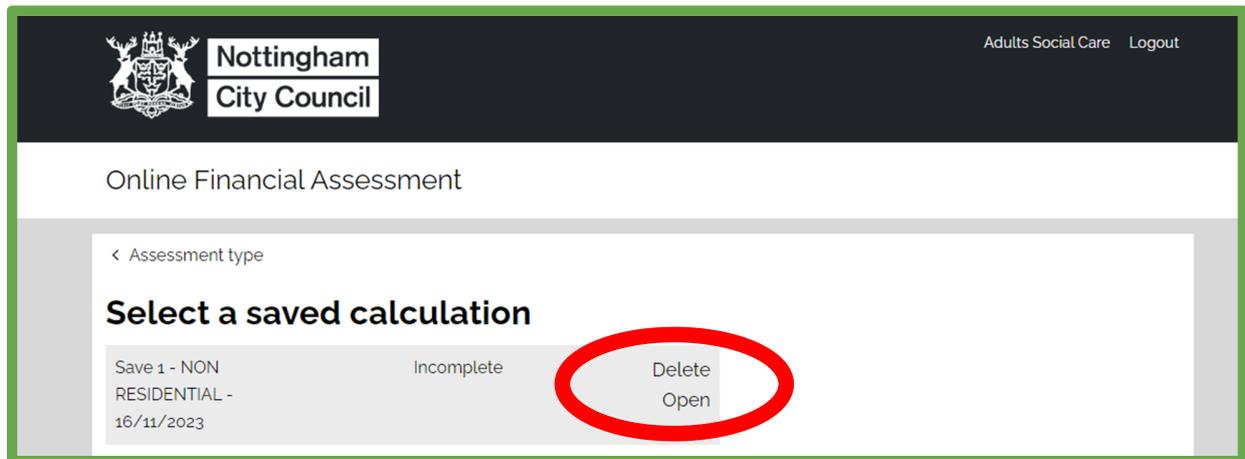
[Calculate my residential contribution](#)

Open a saved calculation

If you saved an incomplete calculation you can continue working on it.

[Open your saved calculations](#)

Step 3 - Select an option to either delete or open the saved assessment.



The screenshot displays the Nottingham City Council website header with the logo and navigation links for 'Adults Social Care' and 'Logout'. Below the header, the page title is 'Online Financial Assessment'. A breadcrumb trail shows '< Assessment type'. The main heading is 'Select a saved calculation'. A table lists a saved calculation with the following details:

Save 1 - NON RESIDENTIAL - 16/11/2023	Incomplete	Delete Open
---	------------	----------------

The 'Delete' and 'Open' buttons are circled in red.

Downloading your Online Financial Assessment Summary - Desktop

When you have completed all sections of the Online Financial Assessment, you will be provided with the summary page with an **estimated** maximum contribution you may have to pay towards your care. You will also be able to view an extended breakdown of your income and expenditure based on the information you have provided throughout the assessment.

At this stage you may wish to submit your assessment (see pages 29-33), however this is not compulsory. Instead, you have the option to download your Online Financial Assessment Summary.

If you wish to download your Online Financial Assessment Summary, scroll to the bottom of the webpage and select the '**Download**' button.

Contact details for the Data Controller (for the purpose of the UK general GDPR 2016 and Data Protection Act 2018):

You can contact the data protection officer at:
Information.Compliance@nottinghamcity.gov.uk. or,

Information Compliance Team
Nottingham City Council
Loxley House,
Station Street,
Nottingham
NG2 3NG

Further Information

For more information about these rights please refer to our detailed privacy statement at:
[Nottingham City Council Privacy Statement](#).

Declaration

I confirm that the details provided for the purposes of this financial assessment are true and accurate and that to the best of my knowledge, all income and capital assets have been declared. I understand that I have an obligation to inform Nottingham City Council immediately of any change in circumstances financial or otherwise that may affect the amount of my assessed charge or my ability to pay any contribution that may be due.

Do you agree?

Yes No

i If you select no, you will not be able to submit your financial information. If you are required to make a contribution towards the cost of your care and support, this may mean that you will be treated as a 'self-funder' and will be invoiced for the full cost of the services that you receive. To read more about the rules for Charging for Care and Support, click this link to the Adult Social Care Portal and select the 'My Finances' Tile. For information and support to make sure that you are claiming all of the benefits that you are entitled to, and/or for help with any debt issues, click this link to [Nottingham City Councils Welfare Rights Service](#)

Submitting your Online Financial Assessment - Desktop

Should you wish to submit the Online Financial Assessment, you will first need to have a registered Nottingham City Council Adult Social Care Hub account. For guidance on this, visit the **'Registering for a portal account'** guidance document within the **'Adults Hub Help'** section of the Adults Social Care Hub.

Step 1 - Once you have reached the Online Financial Assessment Summary, scroll to the bottom of the webpage, read and agree with the declaration. Once complete, select **'Continue'**.

Contact details for the Data Controller (for the purpose of the UK general GDPR 2016 and Data Protection Act 2018):

You can contact the data protection officer at:
Information.Compliance@nottinghamcity.gov.uk or,

Information Compliance Team
Nottingham City Council
Loxley House,
Station Street,
Nottingham
NG2 3NG

Further Information

For more information about these rights please refer to our detailed privacy statement at:
[Nottingham City Council Privacy Statement](#).

Declaration

I confirm that the details provided for the purposes of this financial assessment are true and accurate and that to the best of my knowledge, all income and capital assets have been declared. I understand that I have an obligation to inform Nottingham City Council immediately of any change in circumstances financial or otherwise that may affect the amount of my assessed charge or my ability to pay any contribution that may be due.

Yes No

i If you select no, you will not be able to submit your financial information. If you are required to make a contribution towards the cost of your care and support, this may mean that you will be treated as a 'self-funder' and will be invoiced for the full cost of the services that you receive. To read more about the rules for Charging for Care and Support, click this link to the Adult Social Care Portal and select the 'My Finances' Tile. For information and support to make sure that you are claiming all of the benefits that you are entitled to, and/or for help with any debt issues, click this link to [Nottingham City Councils Welfare Rights Service](#)

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

Step 2 - Enter your National Insurance Number and upload any supporting evidence regarding your finances. Once complete, select **'Continue'**.

Online Financial Assessment

< Summary Submit your calculation >

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

i Why do we need this?

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.

ContinueSave for later

Progress tracker

[Hide all](#)

- 1 Your situation**
Hide
 - 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

Step 3 - Select whether you are completing the Online Financial Assessment on behalf of someone else, or completing it for yourself. There is also an option that enables you to enter your council reference number which should be on supporting documentation (this is not necessary for submission). Once complete select '**Continue**'.

The screenshot shows the Nottingham City Council Online Financial Assessment interface. At the top, the Nottingham City Council logo and name are displayed on the left, and 'Adults Social Care Logout' is on the right. The main heading is 'Online Financial Assessment'. Below this, there are navigation links: '< Additional details' and 'Client details >'. The main section is titled 'Submit to your council'. It contains a question: 'Are you submitting this form on behalf of someone else?' with radio buttons for 'Yes' and 'No'. Below this is a 'More information' link. The next field is 'Reference Number (optional)' with a text input box and another 'More information' link. A yellow 'Continue' button is at the bottom of this section. On the right side, there is a 'Progress tracker' with a 'Hide all' link. It lists four steps: 1. Your situation (Hide), 2. Your financial details (Hide), 3. Your estimated contribution (Hide), and 4. Your personal details (Hide). Step 4 is currently active, showing sub-items: 'Additional details', 'Submit your calculation', and 'Client details'.

Step 4 - If you are completing the Online Financial Assessment on your own behalf, enter your personal details here. Once complete, select '**Submit**'.

If you are completing the Online Financial Assessment on behalf of someone else, skip to Step 5.

Online Financial Assessment

< Submit your calculation

Your contact details

Please enter your contact details here.

First name (required)

Last name (required)

Postcode lookup
Enter the postcode to lookup the address

Address

Building and street (required)

Address line 2

Address line 3

Progress tracker

Hide all

- 1 Your situation**
Hide
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

Step 5 - If you are completing the assessment on behalf of someone else, enter their personal details here. Once complete, select **'Submit'**.

Online Financial Assessment

[< Contact details](#)

Details of the person in the submission

Please enter details of the person whose financial information has been used in the calculation.

First name (required)

Last name (required)

Postcode lookup
Enter the postcode to lookup the address

Address

Building and street (required)

Address line 2

Address line 3

Progress tracker

[Hide all](#)

- 1 Your situation**
[Hide](#)
 - 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
 - Contact details
 - Client details