

Financial assessment for services: what to expect

The Care Act 2014 advises that we have a power to charge for services. Therefore, everyone who receives a chargeable social care service from Torbay and Southern Devon Health and Care NHS Trust will be asked to complete a financial assessment. This is to help us calculate how much you will have to pay towards the cost of your services. If you decline to have an assessment you may be required to pay the full amount of your care and support.

Following your initial contact with us in regard to your care and support needs, you will need to have a social care assessment to see if you meet the criteria for us to help with your care and support. If you do meet the criteria you will then need to have a financial assessment.

A member of the Financial Assessment and Benefits (FAB) team will contact you to arrange a suitable time to visit you to complete the financial assessment. You may have a friend, relative or representative present during the visit. Please ensure that the FAB team member show you their ID before they enter your home.

Should you wish to have a full financial assessment you will need to provide evidence of your savings and income. This will include information about your pensions, building society and bank accounts. It may also be necessary to obtain details of any property ownership and mortgage details if relevant and information about those would also help. Any contribution you are required to pay will be from the start date of your care and support services.

The arranged visit will also be an opportunity for you to ask questions about the financial assessment aspect of your care services and we will be happy to help with your enquiries. We will also ensure you are receiving all the welfare benefits you may be entitled to and will assist with any claims if appropriate.

To contact us please call **01803 219700**. For more information and to download other helpful leaflets visit our website

www.tsdhc.nhs.uk/careact

