

Citizens Advice Hampshire –

Confidence With Benefit Calculators - Benefits Checklists – HO2 Case Studies

BENEFITS CHECKLIST 1 – TRUDI ANGELI

HOUSEHOLD	Name	Age	Date of birth	Gender
Client	Trudi Angeli	34	07/11/1986	N/A
Partner				N/A
Child 1	Marcus Angeli	4	07/11/2016	M
Child 2				
Child 3				
Child 4				
Anyone else living in household?				

CAPITAL = £ ____ NIL _____

EARNED INCOME	Client	Partner
Employed / self employed?	Employed	
Number of hours worked	15 / wk / mth	
Gross pay	£133.65 / wk / mth	
Pension contributions	-	
Net pay	£133.65 / wk / mth	
Is income variable?	no	

CHILDCARE COSTS	£ 20	wk / mth	In respect of how many children?	1
------------------------	------	----------	----------------------------------	---

BENEFIT INCOME

Client/partner	Name of benefit	Amount	Weekly/monthly
Client	Tax Credits	£ not sure	
Client	CB	£ not sure	
		£	

OTHER INCOME (eg child maintenance, occupational pension etc.)

Client/partner	Type of income	Amount	Weekly/monthly
		£	
	Child maintenance	£ 30	wk
		£	

HOUSING COSTS

Rent / Mortgage	£ 700	Wk/mth/yr
Service Charge	£ -	Wk/mth/yr
Council Tax Band: B	£ not sure	Wk/10 mth /12 month / yr

HOUSING TYPE ✓

Owner – with mortgage	Private Tenant	tenant (not liable)
Owner – no mortgage	Social Tenant ✓	Temporary accom
shared ownership	living with family	supported accom
Other:		
How many bedrooms?	2	Postcode GU34 1HD

SPECIAL NEEDS eg mental health, physical disability

N/A

CHANGES Are your circumstances about to change which may affect the above?

N/A

BENEFITS CHECKLIST – CASE STUDY 3 – PAUL AND JULIE

HOUSEHOLD	Name	Age	Date of birth	Gender
Client	Paul Smith	34	07/11/1986	N/A
Partner	Julie Bloggs	34	07/11/1986	N/A
Child 1	Rachel Smith	12	07/11/2009	
Child 2				
Anyone else living in household? No				

CAPITAL = £ _____ 0.00 _____

EARNED INCOME	Client	Partner
Employed / self employed?	Employed	
Number of hours worked	30 wk/mth	
Gross pay	£267.30 wk/mth	
Pension contributions	Nil wk/mth	
Net pay	£252.07 wk/mth	
Is income variable?		

CHILDCARE COSTS	£	NIL	wk/mth	In respect of how many children?

BENEFIT INCOME

Client/partner	Name of benefit	Amount	Weekly/monthly
Client	Child Benefit	£can't remember	
		£	
	PIP Mobility Enhanced Rate	£62.55	Wk
	(hoping soon to get Daily living Standard Rate)	(£60.00)	wk

OTHER INCOME (eg child maintenance, occupational pension etc.)

Client/partner	Type of income	Amount	Weekly/monthly
	none	£	
		£	

HOUSING COSTS

Rent / Mortgage	£950	Wk/mth/yr
Service Charge	£ nil	Wk/mth/yr
Council Tax Band: C	£	Wk/10 mth /12 month / yr

HOUSING TYPE ✓

Owner – with mortgage	Private Tenant	✓	tenant (not liable)
Owner – no mortgage	Social Tenant		Temporary accom
shared ownership	living with family		supported accom
Other:			
How many bedrooms?	2	Postcode	GU34 1HD

SPECIAL NEEDS eg mental health, physical disability

Paul is currently getting PIP mobility component enhanced rate, but is about to apply for upgrade to add Daily Living component, expecting to get Standard Rate.

CHANGES Are your circumstances about to change which may affect the above?

--

BENEFITS CHECKLIST – CASE STUDY 4 MANSOOR AND SAAID

HOUSEHOLD	Name	Age	Date of birth	Gender
Client	Mansoor Ashar	74	07/11/1946	N/A
Partner				N/A
Child 1	Saaid Ashar	17	07/11/2003	M
Child 2				
Child 3				
Anyone else living in household? No				

CAPITAL = £ _____ NIL _____

EARNED INCOME	Client	Partner
Employed / self employed?	No	
Number of hours worked		
Gross pay		
Pension contributions		
Net pay		
Is income variable?		

CHILDCARE COSTS	£ NIL	wk/mth	In respect of how many children?	
------------------------	-------	--------	----------------------------------	--

BENEFIT INCOME

Client/partner	Name of benefit	Amount	Weekly/monthly
		£	
Client	State Pension	£	
Client	Child Benefit	£	
Client	Attendance Allowance	£	

OTHER INCOME (eg child maintenance, occupational pension etc.)

Client/partner	Type of income	Amount	Weekly/monthly
	None	£	
		£	

HOUSING COSTS

Rent / Mortgage	£ 850	Wk/mth/yr
Service Charge	£ nil	Wk/mth/yr
Council Tax Band: C	£	Wk/10 mth /12 month / yr

HOUSING TYPE ✓

Owner – with mortgage	Private Tenant		tenant (not liable)
Owner – no mortgage	Social Tenant	✓	Temporary accom
shared ownership	living with family		supported accom
Other:			
How many bedrooms?	3	Postcode	GU34 1HD

SPECIAL NEEDS eg mental health, physical disability

Saaid is his father's carer.

CHANGES Are your circumstances about to change which may affect the above?

--