



Online Financial **Assessment**

Visual Guidance



Calculate your contribution

This online calculator will tell you how much you might be asked to contribute towards your care.

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 contribute towards the cost of your care.

To find out how much you are likely to have to pay, you will need to complete this online form. You will need to enter details of your income and expenses.

Before you start the form, please read through the **guidance** found here <https://www.oxfordshire.gov.uk/onlinefinancialassessment>.

If you want to submit your details to us for a full financial assessment, then you will need to create an account first and upload evidence of the details you have entered.

What happens next:

The calculator will estimate how much you may need to pay each week. The exact amount will not be confirmed until a Financial Assessment Officer has reviewed your information. They will get in touch within 10 working days.

Calculate my contribution

Landing Page

Create an account first – if you want to **submit** your **form** or be able to **save** your form and come back to it



Sign in

Sign in with your email address

[Forgot your password?](#)

Keep me signed in

Don't have an account? [Sign up now](#)

Verify email address first...

...then create a password for your account





What you will need:

- Your national insurance number
- Details of your savings, income, benefits and expenditure
- Evidence of your savings, income, benefits and expenditure



[Online financial assessment Guidance | Oxfordshire County Council](#)

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

What type of care do you need?

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

Non-residential services

This covers various types of care that you might receive while living at home, including a personal budget, direct payments, home care, community support, respite, short stays in a care home and day care.

Use our non-residential calculator to find out what your weekly contribution towards these services might be:



[Calculate my non-residential contribution](#)

Residential services

Use our residential calculator to find out what your weekly contribution towards a residential home or nursing home might be:



[Calculate my residential contribution](#)

Enter your Date of Birth and confirm whether your capital is under or over the government set limit

You will then have 5 sub sections to complete

If you choose to supply your financial details at the end of the form, then we will ask for person details

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

3 Your estimated contribution

[Hide](#)

Summary

4 Your personal details

[Hide](#)

Additional details

Submit your calculation

Client details



**Do you have your
evidence to hand?**

You will need to provide evidence of the income, benefits, savings and expenses you enter on your form.

You will be expected to upload your evidence at the **end** of the form.

You will need to make sure your evidence is saved on your device (computer, laptop etc).

You can save your form and come back to it if needed.

Here is a link to our support page on evidence required:



[Online financial assessment | Evidence](#)

Your age

What is your date of birth?

For example: 31 3 1970

Day Month Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
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[i Why do we need this?](#)

Continue

Your total savings and assets

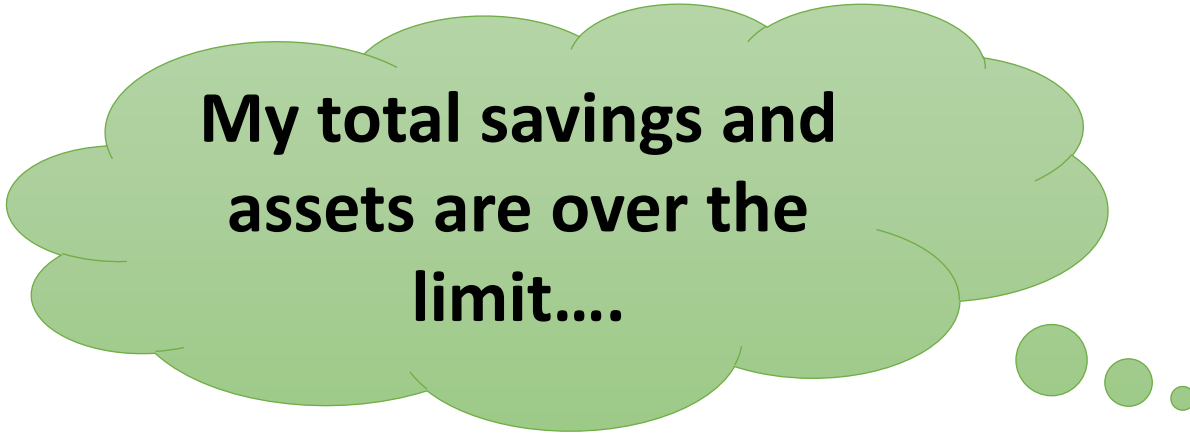
Depending on the value of your savings, you may not need to carry out the full calculation.

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

<input type="radio"/> Yes	<input type="radio"/> No
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[i Why do we need this?](#)

Continue



My total savings and assets are over the limit....

but I want Oxfordshire County Council to arrange and manage my care:

Then tick Yes and continue. You do not need to fill in the rest of the form, you can skip section 2 and go to section 3. You will be charged the full cost of your care.

but only by 20%, and once I pay for some care privately, I will fall below the limit:

Then tick yes and continue to fill out the rest of the form. If we have all your details, it will be quicker for us to do a reassessment, once you are eligible for financial support from us.

Add comments where required



Bank Account

You will need to add an item for each account. Click on Additional Item to add more accounts. Include the date of the balance you are adding, as well as the name of the institution in the comment box, e.g., HSBC, Lloyds. Include the last four digits of the account number e.g., ****1234. If you are overdrawn, use a minus monetary value, e.g., -200. Example: Lloyds ****1234 balance at 10/07/2023 You may be asked to provide 6 months' worth of bank statements once we receive your details.

Amount: Owner: Mine Joint

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

Lloyds ****1234 balance at 10/07/2023

Occupational Pension

Please provide details of your pension in the comments section. You may be asked to provide evidence such as a payslip or bank statement.

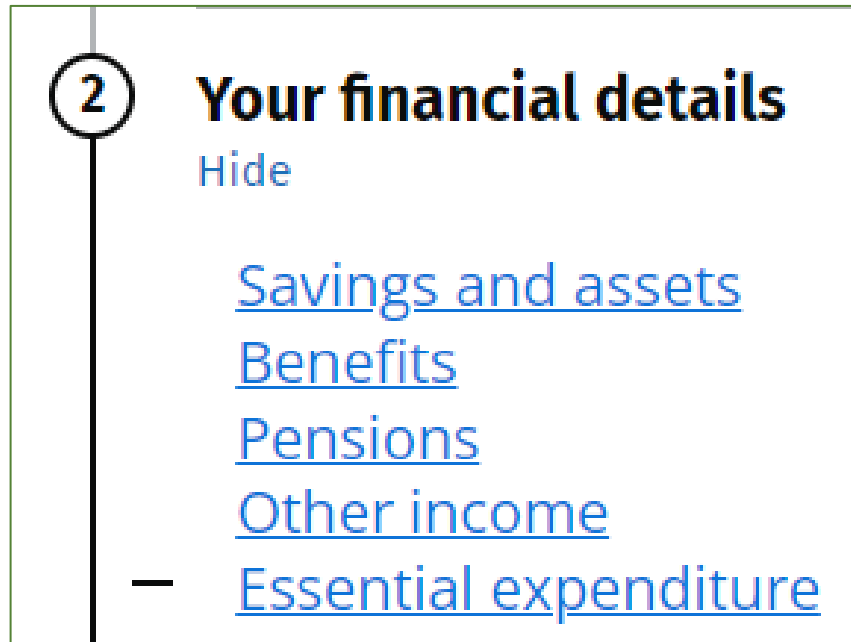
Amount: Owner: Mine Joint Frequency: ▼

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

OCC Pension


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

In each sub-section of Section 2, 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](#)



Continue Save for later

Oxfordshire County Council
County Hall, New Road, Oxford, OX1 1ND

Your result

We calculate your maximum contribution will be:

£13.31 weekly

 [How did we calculate this?](#)

Calculation Summary [View Detailed breakdown](#)

Weekly income



Savings and assets income	£0.00
Benefits	£266.13
Pensions	£0.00
Other income	£0.00
Total income	£266.13

Weekly expenditure

Essential expenditure	£38.47
Total expenditure	£38.47

You can review the details you have entered here (and amend if needed).

i This tool gives you an indication of whether you are likely to need to make a financial contribution to the cost of your care and support. This is an indicative guide only. Please note that your actual contribution may differ from the amount the online calculator works out once your details have been verified by a financial assessment officer.

If you would like to know whether you are eligible for care and support, you will need to contact Oxfordshire County Council for a full needs assessment - [Contact Adult Social and Health Care | Oxfordshire County Council](#)

Oxfordshire County Council is under duty to protect the public funds it administers and to this end may use the information provided for the prevention and detection of fraud. We may also share this information with other bodies responsible for auditing or administering public funds.

We will contact you once we have reviewed your details and confirm any financial contribution you may need to make if you receive care arranged by Oxfordshire County Council.

Submit

Print

Download

Submit your details to us

Download a breakdown of the details you have entered

Please enter your
National Insurance
Number.

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

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

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

Upload your evidence

Without the relevant evidence we cannot complete your assessment.

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

Get in touch with the Financial Assessment Team if you have any queries: 01865 323642

Add documents or photos

You can find more detail on what evidence you need to upload on our support page: <https://www.oxfordshire.gov.uk/onlinefinancialassessment>.

We recommend you review the guidance to ensure you have uploaded the relevant documents which will ensure your assessment is not delayed.

You can add scanned photos or documents as evidence of the details you have entered. If the size of your file is over 15MB, you will need to reduce the size of your file.




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

Continue

Save for later







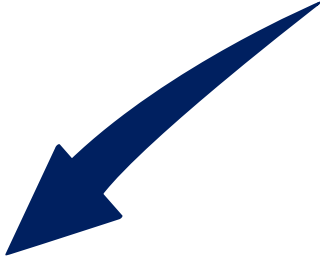
The maximum file size is 15MB
[Choose a file](#) or drag it here.





Documents >




✓ DWP LETTER ✓ Lloyds-Bank Statement





Done!

 DWP LETTER.jpg	Delete
 Lloyds-Bank Statement.jpg	Delete



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

 DWP LETTER.jpg	Delete
 Lloyds-Bank Statement.jpg	Delete

What if I have other information, where do I put this?



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

Other Income

Please indicate in the comments what this income is.

Amount:

Owner:

 Mine Joint

Frequency:

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

Example text of additional information that I cannot enter elsewhere.

You can add comments (without a value) to provide additional information.

You can attach a word document with more information (that you think is relevant) in the evidence upload section.

Submit to your council

Are you submitting this form on behalf of someone else?

Yes No

[More information](#)

Reference Number (optional)

[More information](#)

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

Enter the postcode to lookup the address

Once you have submitted your details – you should get this Thank You page.

If you do not hear from us in 10 working days – please get in touch.

Thank You

Thank you for taking the time to complete the financial self-assessment. Your information has now been submitted to Adult Social Care.

We will contact you by email within 10 days with regards to the information you have provided, but if your situation changes, please contact the Financial Assessment Team on 01865 323642 (Mon – Thurs 9am to 5pm and Fri 9am to 4pm).

You may also find the following pages useful:

- Financial advice - [Money matters – Oxfordshire](#)
- [A guide to paying for your care | Oxfordshire County Council](#)
- [Finding someone to speak for you | Oxfordshire County Council](#)
- Getting your own care - [Buying your own care services | Oxfordshire County Council](#)
- Find a range of services in your area on [Live Well Oxfordshire](#)

[Return to the OFA homepage](#)