

ONLINE FINANCIAL ASSESSMENT STEP-BY-STEP-GUIDE



GLOUCESTERSHIRE COUNTY COUNCIL

Online Financial Assessment: Step-by-Step Guide

Please use this step-by-step guide to assist you in completing the online financial assessment. We have made suggestions for the most common problems people have had completing a financial assessment.

The Online Financial Assessment page can be accessed at the following Web address:

[Online Financial Assessment | Gloucestershire County Council](#)



[Home](#) / [Health and social care](#) / [Adult social care](#) / [Paying for adult social care](#) / [Financial Assessment and Online Financial Assessment](#)

Online Financial Assessment

In this section

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Scroll down the page and click on the “Start your Online Financial Assessment” button.

Please sign and return the consent form to us within four weeks. We are unable to complete the financial assessment without this.

You will need to create an account if you are having or are about to have care and support arranged by Gloucestershire County Council. You will need to do this before you begin completing the assessment. Please click the link below 'Start your Online Financial Assessment', and then you will need to click 'Login to the OFA' at the top right of the screen and then select 'Register for new account'. If you have already created an account, please make sure you have logged in before you begin completing the assessment via the 'Login to the OFA' button at the top right of the screen (after clicking on the 'Start your Online Financial Assessment' button below).

Don't create an account if you just want to get an indication of what your contribution to any care and support services might be, and you do not want to submit your financial details to Gloucestershire County Council. You can click on the 'Start your Online Financial Assessment' button below to begin this.

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.

[Start your Online Financial Assessment](#)

You will be presented with this screen. Please ensure you read all the information carefully, particularly the details required before beginning the assessment

Calculate your contribution

This easy-to-use, online calculator will help you find out how much you might have to pay for care and support arranged by Gloucestershire County Council.

The information you enter on the online financial assessment will not be sent to Gloucestershire County Council, unless you choose to submit at the end of the online financial assessment.

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 pay towards the cost of your care. We only assess the financial situation of the person that is receiving care. Our Online Financial Assessment calculator allows you or your representative to supply your financial details online.

Paying for care can use up savings quickly so it is always a good idea to take independent financial advice before making any decisions. You can find information on independent financial advice on the [Your Circle](#) website. Look at Money Matters and Benefits and choose Paying for Care.

Additionally, for more information on paying for your care, please visit: [Adults Social Care payments and charges](#) | Gloucestershire County Council

What will I need?

Before you start the assessment, you will need to gather documents with the details of the following:

- 12 months of bank statements for each bank account or building society that contains your name.
- Savings, investments, or other capital.
- Details of any properties you own or part own.
- Any benefits you receive, for example, Disability Living Allowance (DLA), Personal Independence Payment (PIP), Attendance Allowance (AA), Universal Credit, or any other benefits.
- Income (earnings, your state or occupational pensions).
- Details of essential expenditure, such as council tax, water rates, rent, mortgage.
- Disability related costs (money you spend due to your condition or disability).

There will be an opportunity to upload any evidence at the end of the assessment. It is important that you upload supporting evidence.

Completing the assessment


You can choose whether to complete the assessment for your information only, or you can choose to send the details to us for verification. Based on the information you have entered, the calculator will estimate the maximum you may have to pay towards the cost of your care, pending a full assessment from the Financial Assessment and Benefits team.

Submitting the assessment

If you would like to send your assessment to us once you have finished, you will be asked to register for an account or log in if you are already registered.

[Calculate my contribution](#)

Click on 'Login to OFA' to create an account. This will enable you to save your progress as you complete the assessment.

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COUNTY COUNCIL

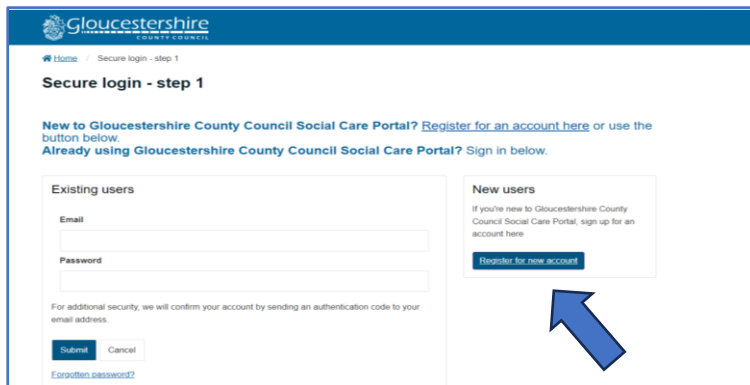
Gloucestershire County Council | [Your Circle](#) | [Login to OFA](#)

Online Financial Assessment

Calculate your contribution

This easy-to-use, online calculator will help you find out how much you

Click on 'Register for new Account' and follow the instructions to setup a new account



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Home / Secure login - step 1

Secure login - step 1

New to Gloucestershire County Council Social Care Portal? [Register for an account here](#) or use the button below.
Already using Gloucestershire County Council Social Care Portal? Sign in below.

Existing users

Email

Password

For additional security, we will confirm your account by sending an authentication code to your email address.

Submit Cancel

[Forgotten password?](#)

New users

If you're new to Gloucestershire County Council Social Care Portal, sign up for an account here

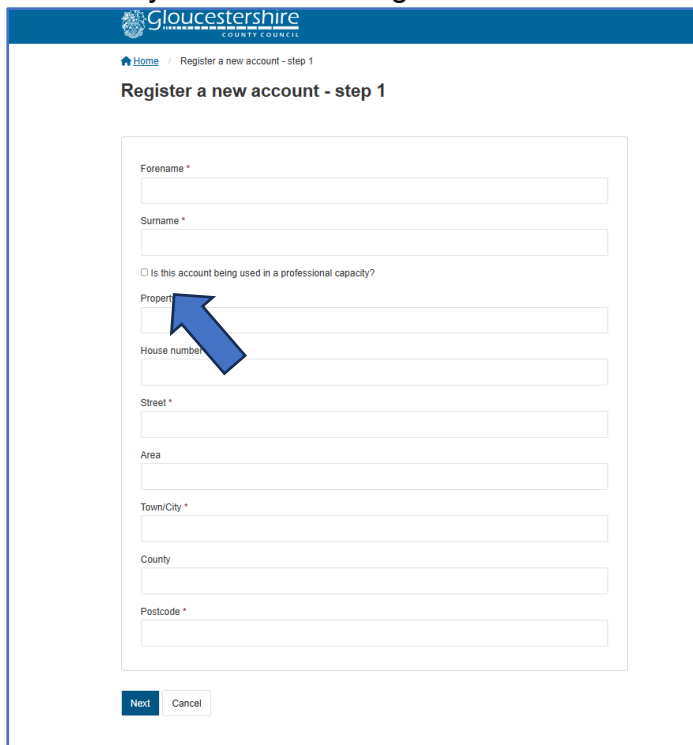
[Register for new account](#)

Please note:

Is this account being registered for professional use? Tick box.

- If **not**, you may leave the box unticked.
- If **yes**, tick the box to reveal two additional fields:
 - **Role**
 - **Organisation**

Enter your own forename and surname, not those of the individual you are representing. You can submit assessment forms for multiple individuals using a single professional account, as each form will prompt you to provide the name of the individual you are submitting on behalf of.



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Home / Register a new account - step 1

Register a new account - step 1

Forename *

Surname *

☐ Is this account being used in a professional capacity?

Property

House number

Street *

Area

Town/City *

County

Postcode *

Next Cancel

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[Home](#) / [Register a new account - step 1](#)

Register a new account - step 2

Email address *

Password *

Confirm password *


[Back](#) [Next](#) [Cancel](#)

Password policy

Your password must meet the following requirements:

- It must be at least 8 characters long
- It must contain at least one letter
- It must contain only letters, digits, and special characters
- It must contain at least one upper-case letter
- It must contain at least one numerical digit
- It must contain at least one special character
- It must be different to your current password
- It must be different to your previous 8 passwords

[View the list of special characters](#)

 **Contact Info** [Privacy](#) [Accessibility](#)

email:
customerservices@gloucestershire.gov.uk

or request from:

[f](#) [t](#) [i](#) [v](#) [r](#)

You will then receive an email containing a verification code



You will need to enter this code in Step 3

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[Home](#) / Register a new account - step 1

Register a new account - step 3

We have just sent you an email to confirm your email address. Please enter the code this contains below. Use the [back](#) button below if you would like to change your email address and try again or [Please send me a new code](#) if you need another one.

If you can't find this email, it may be in your spam/junk email folder.

Code *

Please enter the verification code

[Back](#) [Next](#) [Cancel](#)

[Please send me a new code](#)

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Contact Info

email:
customerservices@gloucestershire.gov.uk

or request from:

Privacy
Accessibility

If your account has been successfully registered, you will see the following screen

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[Home](#) / Register a new account - step 1

Registration completed

Your registration has been completed successfully.

[Continue](#)

Gloucestershire
COUNTY COUNCIL

Contact Info

email:
customerservices@gloucestershire.gov.uk

or request from:

Privacy
Accessibility

Please Do Not select continue. If you select 'continue', an error message will appear

We use cookies on the portal to ensure you have the best experience possible. By continuing to use the website, you agree to their use.
[Adult Social Care Privacy Policy](#)


[Continue with all cookies](#)

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[Home](#) | [Adrian Stratton](#)

[Home](#) / An Unexpected Error Occurred

An Unexpected Error Occurred

 An error occurred while carrying out this operation.

[Return to Children, Young People and Families Portal](#)

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Contact Info

email:
customerservices@gloucestershire.gov.uk

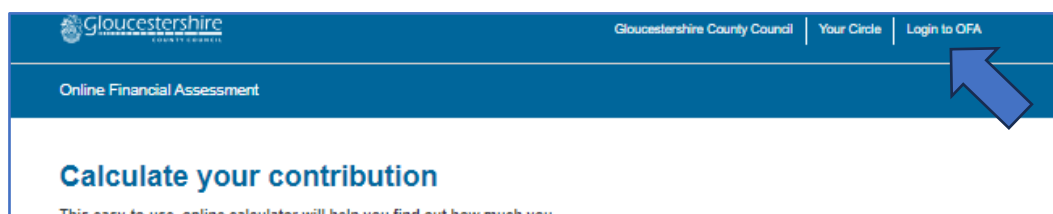
Privacy
Accessibility

To return to the login page, please access the Online Assessment using the following link:

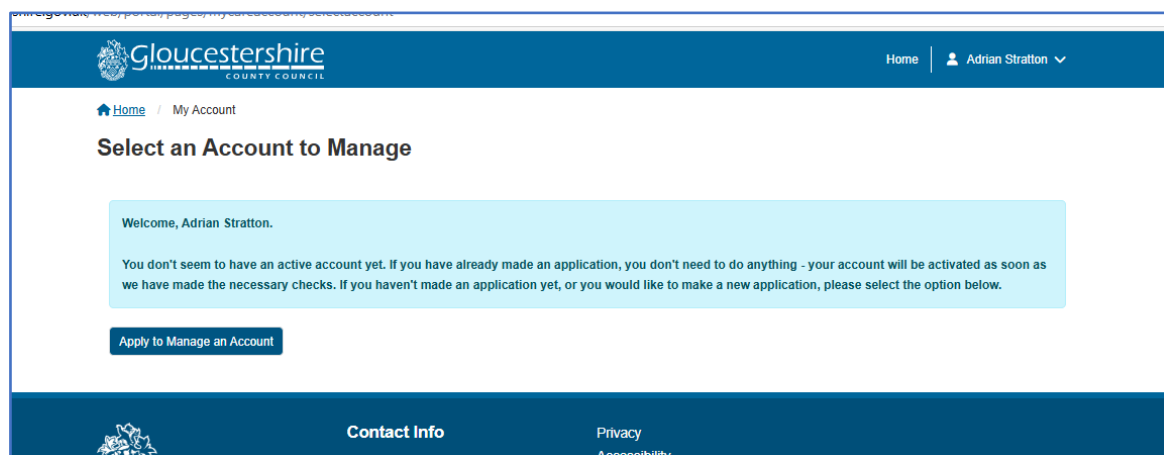
<https://gloucestershire.mycostofcare.com/OFA>



Once you have registered an account click on 'Login to OFA'. Enter your e-mail address and your password and then you will receive a code. Enter this and select Continue.



If you login and see this message



This means the system is down. Please log out and try again later.

If you forget your password, select 'Forgotten Password'. A verification code will be sent to the email address you used during registration. You can then create a new password.

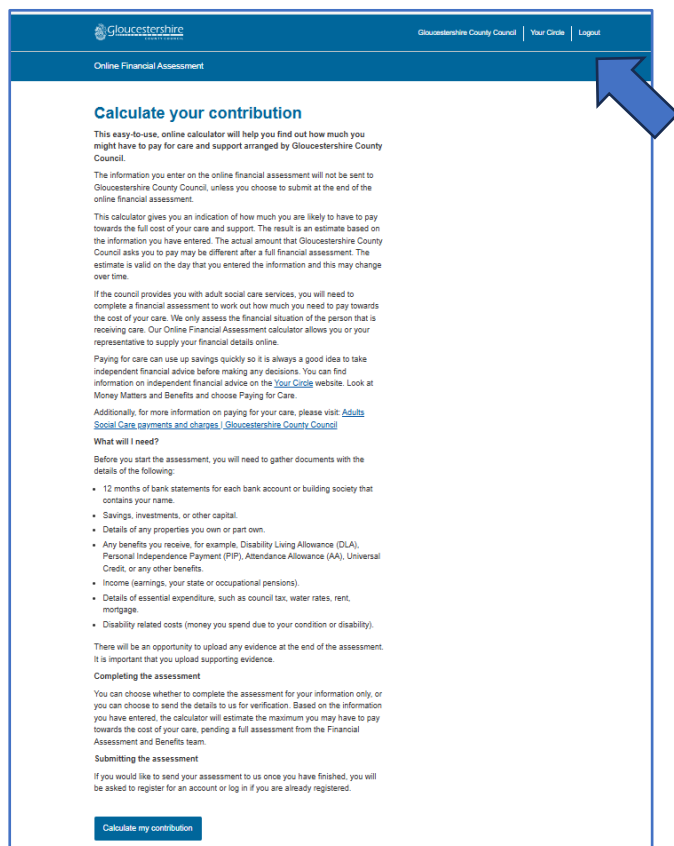
Once you are logged in you will see



The screenshot shows the Gloucestershire County Council website's Privacy Notice page. At the top, there is a blue header with the council's logo and name. Below the header, a navigation bar includes links for 'Home' and 'Privacy Notice'. The main heading is 'Privacy Notice'. A sub-heading says 'Please Read the Privacy Notice', followed by a link 'View Privacy Notice'. There is a checkbox labeled 'I have read the privacy notice'. Below this are two buttons: 'Continue' and 'Cancel'. At the bottom, there is a footer with the council's logo, 'Contact Info' section with an email address 'customerservices@gloucestershire.gov.uk', and a 'Privacy Access' link.

You will then see the below screen again. In the top right corner, you should see the word 'Logout' displayed

This confirms you are logged in.



The screenshot shows the Gloucestershire County Council website's 'Online Financial Assessment' page. The top navigation bar includes the council's logo, 'Gloucestershire County Council', 'Your Circle', and a 'Logout' button. A blue arrow points to the 'Logout' button. The main heading is 'Calculate your contribution'. Below this is a paragraph explaining the calculator's purpose. There are several sections of text, including 'What will I need?' which lists required documents and information. At the bottom, there is a 'Calculate my contribution' button.

Once you return to the main page, click on 'Calculate my contribution'.

Then, select the type of care you require:

1. Care in your home or respite care – select 'Non-residential contribution'
2. Permanent care in a home – select 'Residential contribution'

If you are looking for a previously created assessment, please scroll to the bottom of this page to view it.

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 or in the community, including Short Break Care (Respite Care).

The Non-Residential Calculator can also be used as a tool to submit your information to Gloucestershire County Council for the purposes of Short Break (Respite) assessments.

If using the calculator for this purpose, then please note the calculation outcome given at the end will not represent any potential charge for Short Break (Respite); as this charge will have to be manually calculated by the financial officer once the information has been submitted. The outcome at the end will only represent any potential Non-Residential charge.

The Non-Residential calculator will estimate what your weekly contribution might be if Gloucestershire County Council arranges your care and support.

[Calculate my non-residential contribution](#)

Residential services

This covers permanent residential and nursing care. It does not calculate contributions for temporary placements.

The residential calculator will estimate what your weekly contribution might be if Gloucestershire County Council arranges your care and support.

[Calculate my residential contribution](#)

Example of Non-Residential contribution process is below:

Enter the age of the person receiving care.

[< Assessment type](#)

Your age

What is your date of birth?

For example: 31 3 1970

Day Month Year

[Why do we need this?](#)

[Continue](#)

This section outlines your age-related allowance.


You must retain at least this amount as your weekly available income. A financial contribution will only be calculated if your income, after deducting relevant expenses, exceeds this allowance. The age-related allowance is determined by the government and varies depending on your age.

Next, you will be asked about your savings and assets (excluding your primary residence):

Are your savings and assets over £23,250?


- Select 'Yes' if they are.
→ You will be required to pay the full cost of your services. However, it is still recommended to complete the financial information, as this allows Financial Assessment and Benefits (FAB) officers to calculate when your capital may drop to the threshold limit.
- Select 'No' if your savings are below the threshold.

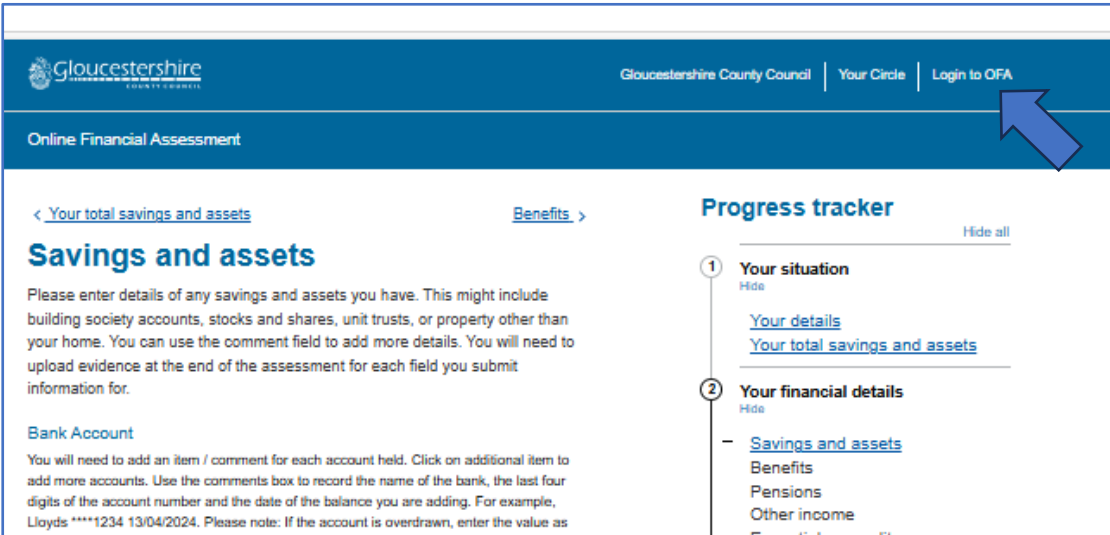
Please select 'Continue' to proceed.

 Important: From this point onward, remember to click the 'Save' button at the bottom of each page to ensure your progress is saved.

 Timeout Warning:

If you take too long to complete a section, the system may return to the initial screen or log you out automatically. In this case, you will need to log back in.

 Tip: Check the top right corner of the screen. If it says 'Login to OFA', it means your session has timed out.




The screenshot displays the Gloucestershire County Council Online Financial Assessment (OFA) interface. At the top, the Gloucestershire County Council logo is on the left, and navigation links for 'Gloucestershire County Council', 'Your Circle', and 'Login to OFA' are on the right. A blue arrow points to the 'Login to OFA' link. Below the header, the page title 'Online Financial Assessment' is shown. The main content area is divided into two sections: 'Savings and assets' on the left and 'Progress tracker' on the right. The 'Savings and assets' section includes instructions to enter details of savings and assets, a 'Bank Account' subsection, and a list of items to add. The 'Progress tracker' section shows two steps: '1 Your situation' and '2 Your financial details'. Under '2 Your financial details', the 'Savings and assets' item is expanded, showing a list of sub-items: 'Savings and assets', 'Benefits', 'Pensions', 'Other income', and 'Essential expenditure'.

If you are not 'logged in' the data you enter, WILL NOT be saved.

Once you log back in, you will return to the last page that was saved.

You will see 'Logout' displayed in the top right corner, confirming that you are logged in.

 Important: A 'Save for later' button will also be visible. Be sure to click this between each section to ensure your progress is saved.

 Please note:
If you are not logged in, any data you enter will not be saved.

Please complete the Savings and assets sections – please note that you can add comments to the sections.

[< Your total savings and assets](#)[Benefits >](#)

Savings and assets

Please enter details of any savings and assets you have. This might include building society accounts, stocks and shares, unit trusts, or property other than your home. You can use the comment field to add more details. You will need to upload evidence at the end of the assessment for each field you submit information for.

Bank Account

You will need to add an item / comment for each account held. Click on additional item to add more accounts. Use the comments box to record the name of the bank, the last four digits of the account number and the date of the balance you are adding. For example, Lloyds ****1234 13/04/2024. Please note: If the account is overdrawn, enter the value as £0.00 in the amount box and enter the actual overdrawn balance in the comments box.

Amount: Owner: ☒ Mine ☐ Joint

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

Building Society

You will need to add an item / comment for each account held. Click on additional item to add more accounts. Use the comments box to record the name of the building society, the last four digits of the account number and the date of the balance you are adding. For example, Lloyds ****1234 13/04/2024. Please note: If the account is overdrawn, enter the value as £0.00 in the amount box and enter the actual overdrawn balance in the comments box.

Amount: Owner: ☒ Mine ☐ Joint

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

ISA

You will need to add an item / comment for each account held. Click on additional item to add more accounts. Use the comments box to record the name of the bank or building society, the last four digits of the account number and the date of the balance you are adding. For example, Lloyds ****1234 13/04/2024.

Amount:

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

Other Property

Please record the value of any other property or land you own / part own. Please do not include the property you currently live in or have lived in prior to moving into a residential care setting.

Amount: Owner: ☒ Mine ☐ Joint

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

Post Office Card Account

You will need to add an item / comment for each account held. Click on additional item to add more accounts. Use the comments box to record the last four digits of the account number and the date of the balance you are adding. For example, Post Office ****1234 13/04/2024.

Amount: Owner: ☒ Mine ☐ Joint

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

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

Then select continue.

Select Benefits section and provide details of any relevant information.



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Gloucestershire County Council | Your Circle | [Login to OFA](#)

Online Financial Assessment

[< Savings and assets](#)

[Pensions >](#)

Benefits

Please enter details of any of the following benefit types that you receive. You will need to upload evidence at the end of the assessment for each field you submit information for.

Do you receive any disability benefits?

☐ Yes ☒ No

Do you receive any employment benefits?

☐ Yes ☒ No

Do you receive any other benefits?

☐ Yes ☒ No

Universal Credit

☐ Yes ☒ No

Additional benefits

Benefits in this section are *not* included when we calculate your contribution. You may find it useful to enter them anyway for completeness.

Disability Living Allowance (Mobility) - High

☐ Yes ☒ No

Disability Living Allowance (Mobility) - Low


☐ Yes ☒ No

PIP - Enhanced Rate (Mobility)

☐ Yes ☒ No

PIP - Standard Rate (Mobility)

☐ Yes ☒ No



Some items have been hidden because they would not normally apply to you, based on the date of birth you have entered. If you are in receipt of a benefit which you cannot see in the list then you can show these items:
[Show hidden items](#)

Continue

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

Select continue.

Complete Pensions section if relevant

[< Benefits](#)[Other income >](#)

Pensions

Please enter details of any pension income you receive. This might include private pensions or the state pension. You will need to upload evidence at the end of the assessment for each field you submit information for.

Private Pension
Please DO NOT enter as a Joint Figure

Amount: £ Owner: ☒ Mine ☐ Joint Frequency: Weekly

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

State Retirement Pension
Please DO NOT enter as a Joint Figure

Amount: £ Owner: ☒ Mine ☐ Joint Frequency: Weekly

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

War Widows Pension
Please DO NOT enter as a Joint Figure

Amount: £ Owner: ☒ Mine ☐ Joint Frequency: Weekly

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

Widows Pension
Please DO NOT enter as a Joint Figure

Amount: £ Owner: ☒ Mine ☐ Joint Frequency: Weekly

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

Additional pensions
Pensions in this section are *not* included when we calculate your contribution. You may find it useful to enter them anyway for completeness.

War Pension (Post April 2017)
Please DO NOT enter as a Joint Figure

Amount: £ Owner: ☒ Mine ☐ Joint Frequency: Weekly

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

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

[Continue](#)

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

Select Continue for other income.

[Hide all](#)

1 Your situation

Hid

Hd

Your financial details

Hid

Savings and assets

Benefits

Other income

Essential expenditure

Disability expenditure

3 Your estimated contribution

Ho

4 Your personal details

Additional details

Submit your calculation

Client details

Enter Essential expenditure – please complete sections and note you will need to evidence this.

The age-related allowance (shown on the Your Details Screen) should cover everyday expenses, for more information on this, please click on the ‘more information’ button.

[< Other income](#) [Disability expenditure >](#)

Essential expenditure

Some essential expenditure is taken into account and deducted from your income when we calculate your contribution. Please enter details of any of the following that apply.

You will need to upload evidence at the end of the assessment for each field you submit information for.

Please note, you will have the option to submit disability related expenditure on the next page.

Child Minimum Income Guarantee

If you have a child/children under 16 that you are responsible for, and a member of the same household as the child/children, please enter the amount of £101.25 in respect of each child. You will need to add an additional item for each child if you have more than one.

Amount: £ Frequency:

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

Council Tax

Please input the total yearly figure, this is usually shown on your bill as the total amount for the period. Please select 'Yearly' from the frequency list. If joint, then enter the "owner" as joint but DO NOT divide the total figure in two.

Amount: £ Owner: ☒ Mine ☐ Joint Frequency:

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

Home Insurance

Please enter the full amount of the policy and select either joint or sole (mine). If joint DO NOT divide the total figure in two.

Amount: £ Owner: ☒ Mine ☐ Joint Frequency:

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

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](#)

Other Essential Expenditure.

Please add a description of the what the item is in the Comments box. Add an Additional item for each expense. If you input any items that would be covered by the age-related allowance, this will give you an inaccurate result and this will be corrected by a financial assessment officer following a full review of your submission. For more information please click on the 'more information' icon below.

Amount: £ Frequency:

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

The Department of Health tells us how much of your income should be protected within the financial assessment. The age-related amount makes sure you're able to pay for essential household expenses such as food, utilities, insurance, telephone, TV, internet, subscriptions to streaming services and day-to-day items such as toiletries.

Select Continue

Please complete the 'Disability Expenditure' section.
 Be aware that you will need to provide supporting evidence for any claims made.
 Each item includes guidance—please read the descriptions carefully to understand what can be claimed.

[< Essential expenditure](#)
[Summary >](#)

Disability expenditure

Some disability-related expenditure is taken into account and deducted from your income when we calculate your contribution. Please enter details of any of the following that apply.
 You will need to upload evidence at the end of the assessment for each field you submit information for.

Chiropody.
 Amount: £ Frequency: Weekly

Cleaner.
 Amount: £ Owner: ☒ Mine ☐ Joint Frequency: Weekly

Deputyship Fees
 Amount: £ Frequency: Weekly

Equipment Purchase - Other.
 You will need to calculate the weekly cost of the item(s) you have purchased, spread out over a period of 10 years. To do this take the total cost of the item(s) and divide by 500. Enter the weekly value calculated and frequency as weekly. e.g. Cost of item £2,000 / 500 = £4 per week. If you have anything you wish us to consider please add this in the comments.
 Amount: £ Frequency: Weekly

Garden.
 Amount: £ Owner: ☒ Mine ☐ Joint Frequency: Weekly

Laundry.
 Amount: £ Frequency: Weekly

Lifelink Alarm.
 Amount: £ Owner: ☒ Mine ☐ Joint Frequency: Weekly

Linen.
 Please enter as "Yearly". Calculate the cost of your special Linen for a year. You will then need to deduct £161.20. Once you have done this please enter the amount and frequency as yearly. i.e. Total Spend per year £250 Minus £161.20 = £88.80 per year to enter
 Amount: £ Frequency: Weekly

Medical Aids.
 You will need to calculate the weekly cost of the item(s) you have purchased, spread out over a period of 10 years. To do this take the total cost of the item(s) and divide by 500. Enter the weekly value calculated and frequency as weekly. e.g. Cost of item £2,000 / 500 = £4 per week. If you have anything you wish us to consider please add this in the comments.

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](#)

Press continue.

You should now see the summary screen displaying the results of your financial assessment. These results are provisional and will not be considered final until they have been reviewed and verified by a member of the financial team.

Online Financial Assessment

[← Disability expenditure](#)

Your result

We calculate your maximum contribution will be:

£0.00

[How did we calculate this?](#)

Calculation Summary [View Detailed breakdown](#)

| Weekly income | | Weekly expenditure | |
|----------------------------|--|----------------------------------|---------------|
| Savings and assets income | £0.00 | Essential expenditure | £0.00 |
| Benefits | £0.00 | Disability expenditure | £23.00 |
| Pensions | £0.00 | | |
| Other income | £0.00 | | |
| Total income | £0.00 | Total expenditure | £23.00 |
| Income less expenditure | | Total income - total expenditure | |
| | | -£23.00 | |
| Age-related allowance | | £228.70 | |
| Weekly contribution | Income - expenditure - age-related allowance | | £0.00 |

i This calculator gives you an indication of how much you are likely to have to pay towards the full cost of your care and support. The result is an estimate based on the information you have entered. The actual amount that Gloucestershire County Council asks you to pay may be different after a full financial assessment. The estimate is valid on the day that you entered the information and this may change over time.

What next?

If you wish to submit your online financial assessment, please scroll to the bottom of the page and click continue.

If you have used the online financial assessment calculator to give you an estimate and do not wish to submit at this time, please note the following:

- To find out if you are eligible for means tested support from the council. You will need to have a care needs assessment and a financial assessment.
- There are details of how to contact the council on [Your Guide](#)
- You have the right to refuse a financial assessment.
- If you do not want a financial assessment, or if you know you will not qualify for financial help, you will have to pay the full amount.
- Paying for care can use up savings quickly so it is always a good idea to take independent financial advice before making any decisions.
- You can find information on independent financial advice on the Money Matters website. Look at Money Matters and Benefits and choose Paying for Care.

Yes

Print

Download

Please read the Declaration (and if you agree) click **Yes**. If you select 'No', you will not be able to submit your financial assessment.


If you do not see the 'Yes' button at the end of the page, it indicates that your session has timed out.

Please log back in to continue.

The Assessment is Not Submitted at this stage

Please read the statement for 'How we collect and use your data'. If you do not agree to the policy, click 'No' but you will not be able to submit the assessment to Gloucestershire County council.

If you agree, select 'Yes' and click on continue

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Online Financial Assessment

[< Disability expenditure](#)

How we collect and use your data

When you visit the Online Financial Assessments (OFA) website, we collect personal information about you and where appropriate, the person you are representing. This may include name, address, email address, relationship to each other and details of financial self-assessments and social care finance documents.

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

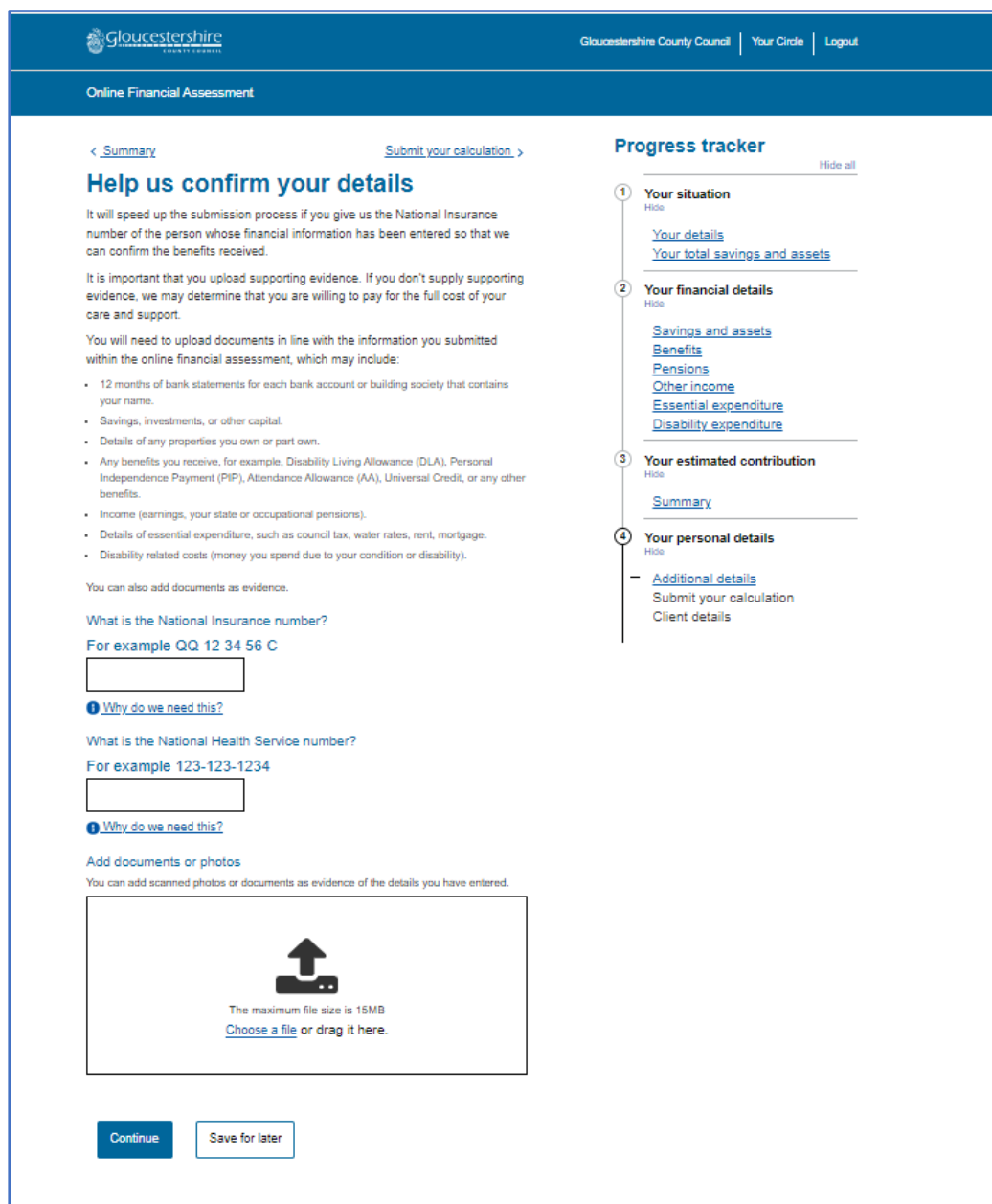
[More information](#)

We only gather and use the minimum amount of personal information that is needed to make a financial assessment. We cannot complete a financial assessment without using your information in this way, so you can only proceed if you consent to us using your information. For more information about how the council uses your personal information please visit the council's privacy notices on our website:

<https://www.gloucestershire.gov.uk/council-and-democracy/data-protection/service-specific-privacy-notice/>

Continue

You will need to provide the details of the individual requiring the OFA, along with any supporting evidence relevant to the assessment.



Gloucestershire County Council | Your Circle | Logout

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.

It is important that you upload supporting evidence. If you don't supply supporting evidence, we may determine that you are willing to pay for the full cost of your care and support.

You will need to upload documents in line with the information you submitted within the online financial assessment, which may include:

- 12 months of bank statements for each bank account or building society that contains your name.
- Savings, investments, or other capital.
- Details of any properties you own or part own.
- Any benefits you receive, for example, Disability Living Allowance (DLA), Personal Independence Payment (PIP), Attendance Allowance (AA), Universal Credit, or any other benefits.
- Income (earnings, your state or occupational pensions).
- Details of essential expenditure, such as council tax, water rates, rent, mortgage.
- Disability related costs (money you spend due to your condition or disability).

You can also add documents as evidence.

What is the National Insurance number?
For example QQ 12 34 56 C

[Why do we need this?](#)

What is the National Health Service number?
For example 123-123-1234

[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 Save 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](#)

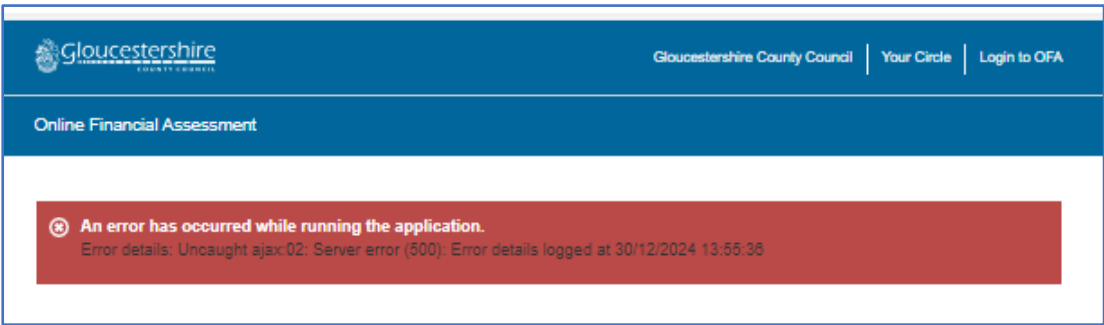
You can now upload your supporting evidence, such as bank statements.

You may upload up to 20 files, with a maximum size of 15MB per file.

📧 If you experience issues uploading files or have additional documents to submit, you can email them as attachments to OFA@Gloucestershire.gov.uk.

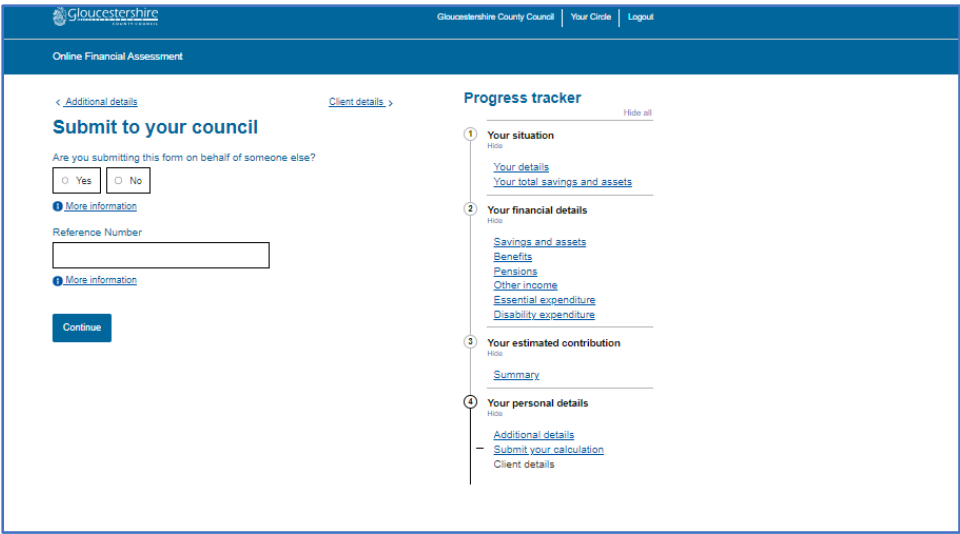
Please include identifying details in your email so we can match the documents to your online submission.

Please note: If you take too long to complete a section, you may be logged out automatically or see a timeout message




Use the ‘Save’ button at the end of each page to avoid losing your progress.
If you are logged out and have not saved your assessment, you will need to re-enter and resubmit the information.

If all information has been entered correctly, you will then see the confirmation screen



Select Continue

If the person completing the form is not the same as the person receiving care, please complete the 'your contact details' page, then please press 'Continue'


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[Logout](#)

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.

Please be aware, by law, we are unable to speak to someone other than the person being assessed unless they have the necessary legal authority already in place or the written consent of the person we are assessing.

First name (required)

Last name (required)

Postcode lookup

Enter the postcode to lookup the address

Email (required)

What if I don't have an email?

Telephone

Relationship to client


Please select your relationship to the client ... ▼

Progress tracker

[Hide all](#)

- Your situation**
[Hide](#)
 - [Your details](#)
 - [Your total savings and assets](#)
- Your financial details**
 - [Savings and assets](#)
 - [Benefits](#)
 - [Pensions](#)
 - [Other income](#)
 - [Essential expenditure](#)
 - [Disability expenditure](#)
- Your estimated contribution**
[Hide](#)
 - [Summary](#)
- Your personal details**
[Hide](#)
 - [Additional details](#)
 - [Submit your calculation](#)
 - [Contact details](#)
 - [Client details](#)

Enter the details of the person receiving the care.



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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

Lookup

Enter address manually

Email

Telephone

Submit

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

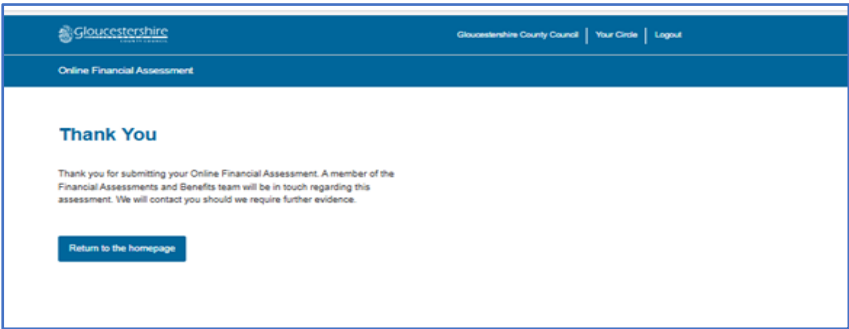
Your personal details

Hide

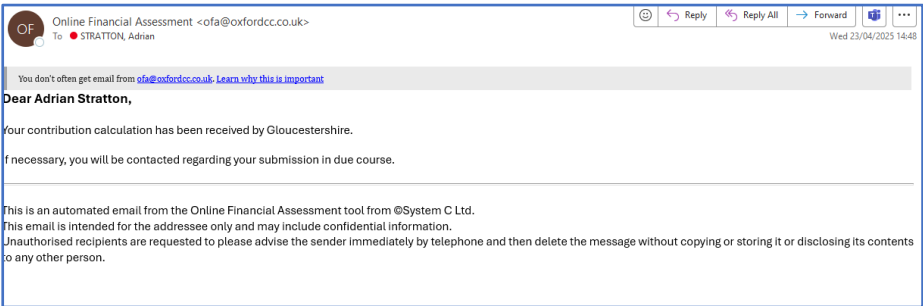
[Additional details](#)
[Submit your calculation](#)
[Contact details](#)
[Client details](#)

Press 'Submit' to complete the form and send to Gloucestershire County Council

The 'Thank You' screen will be shown once the form is submitted. If you do not see the Thank You screen then the form has not been submitted.



A confirmation email will be sent to you upon successful submission of the form



Common Problems and Troubleshooting Tips

1. Account Not Opened Correctly
Ensure all required fields are completed accurately when opening an account.
2. Account Activation Delay
Please note that account activation may take some time. If it doesn't activate immediately, allow a short period before trying again.
3. System Downtime
If you are unable to log in, the system may be temporarily down. Please wait and try again shortly.
4. Failure to Log In After Account Creation
After creating an account, some users forget to log in again. Make sure to log in to continue.
5. Session Timeout or Errors
If you experience a timeout or error, you must log back in. Check the top right corner of the screen — it should say "LOGOUT" to confirm you are signed in.
6. Not Using 'Save for Later'
If you do not use the "Save for Later" option after each section, your data may be lost due to timeouts or errors. Always save your progress regularly.
7. Incomplete Submission After Calculation
Reaching the calculation stage and downloading or printing the results does not mean the assessment is complete. You must click "Continue" or "Yes" to submit.
8. Issues Uploading Evidence
Uploads may fail due to timeouts or large file sizes. If you encounter issues, email the evidence to OFA@Gloucestershire.gov.uk. Be sure to complete the remaining sections of the form afterward.