**UNCLAIMED BENEFIT ENTITLEMENTS - LET US CHECK**

**CLIENT**

**SURNAME …………………………..…..**

**FIRST NAMES ………………………………**

**Date of Birth …………………………....…**

**National Insurance No:**

**………………………………………………….**

**PARTNER**

**SURNAME …………………………...**

**FIRST NAMES ……………………………**

**Date of Birth …………………………....**

**National Insurance No:**

**………………………………………………….**

**#]**

**ADDRESS ……………………………………………………………………...**

**……………………………………………………………………….**

**………………………………………………………………………**

**POSTCODE …………………………………………………..**

**TELEPHONE No ……………………………………………….….**

**EMAIL .………………………………………………….**

**INSTRUCTIONS FOR COMPLETION**

* Please state the income and savings for both you and your partner (if you have one)
* In the relevant income box state the amount you receive and the **frequency** it is paid.

If you have any difficulty completing this form, please call us, where we can offer support over the phone or arrange an appointment to assist.

If you receive UNIVERSAL CREDIT, please provide a copy of an award letter.

The data controller is Age UK Torbay, 12 Dendy Road, Paignton, Devon. TQ4 5DB

01803 555181 [reception@ageuktorbay.org.uk](mailto:reception@ageuktorbay.org.uk) Registered Charity No 1084684

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|  |  |  |
| --- | --- | --- |
| **Income** | **Client** | **Partner** |
| State Retirement Pension  Private Pensions (Net after tax)  Pension Credit / Income Support  JSA:-  ESA:-  **Please circle** the type of ESA:-  Attendance Allowance  DLA :- Care  Mobility  PIP :- Daily Living  Mobility  Any Other Benefits - please state  **Employed**  Earnings Gross  Hours worked.  Does anyone claim a carer's allowance for caring for you?  Do you care for someone who is sick or disabled?  Are you ill or disabled but not claiming benefits? | £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  **Work-Related** or **Support**  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  hrs…………..  YES / NO  YES / NO  YES / NO | £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  **Work-Related** or **Support**  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  £……….. every …………  hrs………….  YES / NO  YES / NO  YES / NO |

|  |  |  |
| --- | --- | --- |
| **Total Savings/Capital** | **Client** | **Partner** |
| Include Current bank a/c, savings, ISA, bonds, Premium bonds, stocks, shares etc. | **£** | **£** |
| Do you own other land or property?  (Estimated value of property you don’t occupy) |  |  |

**COUNCIL TAX**

Your Council Tax Band: **please circle A B C D E F G H**

How many bedrooms does your property have? ………..

Annual Council Tax **before** discounts £……………………..

**Accommodation / Housing Costs**

Weekly rent payable as per tenancy agreement £…………………….

Heating charges **only** if included in your rent £…………………….

Weekly service charge (if applicable) £……………………..

Circle which applies: **Private -** **Social/Council** - **Housing Association -** **Owner/Occupier**

If applicable. Housing Benefit amount £………………………

Have you been in **continuous** receipt of Housing Benefits since April 2019? **YES / NO**

If you own a home or have purchased a shared ownership property, you may qualify for assistance with interest payments on your mortgage or loans for specific repairs and improvements to your home.

This help is called Support for Mortgage Interest (SMI).

To be eligible, you must own your home or have bought a shared ownership property. You must also be getting one of the following qualifying benefits:

* [Income Support](https://www.gov.uk/income-support)
* income-based [Jobseeker’s Allowance (JSA)](https://www.gov.uk/jobseekers-allowance)
* income-related [Employment and Support Allowance (ESA)](https://www.gov.uk/employment-support-allowance)
* [Universal Credit](https://www.gov.uk/universal-credit)
* [Pension Credit](https://www.gov.uk/pension-credit)

Would like more information regarding SMI? **YES / NO**

Other occupants **in addition** to your partner (non-dependants)

**Please state for each Non-dependant.**

For each non-dependent state:

* Age.
* Gross weekly income if working 16+ hours per week.
* **Benefits:** state benefit, amount & frequency.
* Are they sight impaired, blind, or diagnosed with Severe Mental Impairment?
* Their relationship to you.

|  |
| --- |
| **Equalities and Diversity Monitoring Questionnaire**  Monitoring the diversity of our clients is an essential part of Age UK Torbay’s commitment to equality and diversity. It is entirely confidential and will not be used for any purpose other than monitoring and statistical reporting.  1. Date of birth\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  2. Gender Male Female  3. Ethnicity  White: Mixed:  British White and Black Caribbean    Irish White and Black African  Other White White and Asian  Other Mixed    Asian or Asian British: Black or Black British:  Indian Black Caribbean  Pakistani Black African  Bangladeshi Other Black  Other Asian  Chinese or another ethnic Group:  Chinese  Another ethnic group  4. Do you consider yourself to have a disability?    Yes No  Thank you for your cooperation in completing this questionnaire. |

**CONSENT FORM FOR DATA PROCESSING IN**

**RELATION TO YOUR ADVICE ENQUIRY**

**Recording and storing data**

Do you consent to us keeping a record of your details and your enquiry? *(please tick the relevant box)*

YES

NO

**External audit**

Do you consent for Age UK, the national charity, to have access to your record, to undertake quality checks?

*(please tick the relevant box)*

YES

NO

**Contacting third parties**

In progressing your advice case we may need to speak to external third party organisations. We will always

contact you before making contact with a third party to discuss the action to be undertaken and check that

you are happy for us to do this. Below is a list of organisations we commonly need to contact. Ticking the

boxes below will make it easier for us to evidence that we have your consent to contact these organisations

following a conversation with you.

Department of Work & Pensions (DWP)

Torbay Council

Health Services (eg NHS, GP)

**Name: ………………………………………………………….. Signature: ………………………………………………………..**

**Date: ……/……/………**

**Please see the next page of this document for information about why we need your consent, how we use**

**and store your data and your rights to access, amend and have your data deleted.**

**For office use only:**  
Date received: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Processed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Reference number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Consent Form – Additional Information – Age UK TORBAY**

**For your Information & Retention**

**Sensitive data**

We will potentially collect data about you which is considered to be sensitive. For example, we will collect

data about:

* your health and disabilities if we are supporting you to complete a disability related benefit application
* your age to ensure eligibility for rights, entitlements and benefits
* your age, gender and ethnicity for service planning and reporting (this data will always be anonymised)

**Why do we record and store your data?**

In order to help you, we need to store information about you. We do this so that:

* we can check the quality of information and advice given by our service
* we can find the information if you need to come back to us for more help
* we can provide anonymized data to our funders and delivery partners (eg Age UK national, South Devon Health Care Trust, Torbay Council, Voluntary Community & Social Enterprise (VCSE) partners in Torbay)
* we can use the data to understand the needs of older people in Torbay and plan our services to meet them
* We can defend ourselves against legal claims

**Why do we need consent for external auditors?**

Samples of Age UK Torbay’s advice case files are checked by external auditors from Age UK, the national charity, to check the quality of our advice service. They will keep all your information confidential. and we will only let them see your files if you consent to this.

**How long will we keep your data?**

We will not share your information with third parties after 12 months without new consent.

We keep your details securely on our database for 6 years**.** After this time, your information will be securely deleted unless legally required otherwise.

**What are your rights?**

You have the right to:

|  |  |
| --- | --- |
| * Object to processing | * Access your data |
| * Question automated decisions | * Correct mistakes |
| * Restrict how we use your data | * Request deletion ('right to be forgotten') |

To exercise these rights, contact our **Data Protection Officer:** Deputy Chief Officer – John Hodder – [john@ageuktorbay.org.uk](mailto:john@ageuktorbay.org.uk), 01803 555181.

You can find out more information about your rights and how we use data via our Privacy Policy at: <https://www.ageuk.org.uk/torbay/privacy-policy/>

**ADDITIONAL INFORMATION**

**Withdrawing consent:**  
You can withdraw consent at any time by contacting our Data Protection Officer. This won't affect the lawfulness of processing before withdrawal.

**Data security:**  
We protect your information through encryption, regular security testing, staff training, and access controls. We'll notify you and the authorities if any data breach occurs.

**Complaints:**  
If you have concerns, contact:

1. Our Data Protection Officer is [john@ageuktorbay.org.uk](file:///C:\Users\Mark.Tomlinson\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\CSPONPK1\john@ageuktorbay.org.uk)
2. The Information Commissioner's Office (ICO)  
   Website: [www.ico.org.uk](http://www.ico.org.uk)  
   Helpline: 0303 123 1113
3. Age UK Torbay is registered with the ICO. Reference **Z4999420**