

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 Registered Charity No 1084684

Age UK Torbay is a company limited by guarantee. Registered in England and Wales No 4046684

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

British ☐
Irish ☐
Other White ☐

Mixed:

White and Black Caribbean ☐
White and Black African ☐
White and Asian ☐
Other Mixed ☐

Asian or Asian British:

Indian ☐
Pakistani ☐
Bangladeshi ☐
Other Asian ☐

Black or Black British:

Black Caribbean ☐
Black African ☐
Other Black ☐

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 5 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, 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
 2. The Information Commissioner's Office (ICO)
Website: www.ico.org.uk
Helpline: 0303 123 1113
 3. Age UK Torbay is registered with the ICO. Reference **Z4999420**
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