

Housing Benefit Checklist

Clients Name.....Ref.....

Step 1: Check how much capital

£

Note: Over £16,000 no entitlement. £1 tariff income for every £250 or part there of between £6,000 and £16,000

Step 2: Work out eligible Housing Costs (Rent and Rates)

Note: Remember to check:

- 1) if Housing Executive Housing Association or private sector housing
- 2) age of customer

Get break down of rent and/or rates

Eligible rent

Eligible rates

Eligible Housing Costs Total

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Step 3: Non-Dependent Deductions

Check if there is a non-dependant living in the household **Yes** **No**



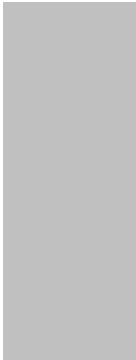
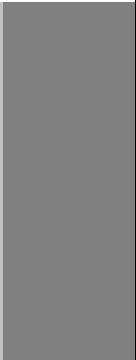
If Yes, check if a non-dependant deduction will be made **Yes** **No**

Non-dependant deduction for rent

Non-dependant deduction fo rates

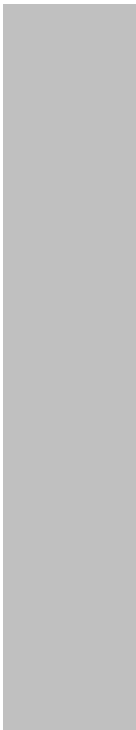

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<input type="text"/>	<input type="text"/>

Step 4: Work out Applicable Amount

Personal Allowances		
No of dependant children		
Premiums - more than one may be payable, enter name & amount		
		
Applicable Amount Total		

Step 5: Work out customer's and/or partners income

Student income from ELB will be over 43 weeks however this can be changed

Student Loan			annual amount*
Minus			
Minus			
Divided by			
Student Loan Subtotal			
Minus			
Student loan total			annual amount*
Divided by			

Adult dependants' grant		annual amount*
Divided by		
Adult dependants' total		
Further Education Awards		annual amount*
Minus		
Minus		
Divided by		
Further education total		
Postgraduate Awards		
Minus		
Minus		
Divided by number of weeks		
Postgraduate Studentship and Cast awards total		
* student/parental/partner's contributions may be taken into account, check		
Earned Income		
Student net earned income		
plus Partner net earned income		
Minus Disregard		
Earned Income Total		

Remember: to include any 30 hour work disregard, any childcare disregard and any assessed contribution to a student on loan by a non-student partner

Benefit Income	
Child Benefit	
Child Tax Credit	
Working Tax Credit	
Carer's Allowance	
Incapacity Benefit	
Other Benefits	
DLA & AA are disregarded in full	
Benefit Income Total	
Other Income	
Occupational Pension	
Tariff income from capital	
Maintenance payments	
Other	
Other Income Total	
Income from ALL Sources Total	

Step 6: Have you got 'Excess Income'	
Income from ALL Sources Total	Step 5
Minus Applicable Amount Total	Step 4
Excess Income	
<p>If Step 5 total is less than, or equal to Step 4 total you do not have 'excess income'</p> <p>If Step 5 total is greater than Step 4 total you have 'excess income'</p> <p>If you do not have 'excess income' go to Step 7</p> <p>If you have 'excess income' go to Step 8</p>	

Step 7: Housing Benefit calculation with No 'Excess Income'

	Eligible Rent	Step 2		
Minus	Non-Dependant deduction for rent	Step 3		
	Eligible Rent Subtotal			
	Eligible Rates	Step 2		
Minus	Non-Dependant deduction for rates	Step 3		
	Eligible Rates Subtotal			
	Housing Benefit Total			

Step 8: Housing Benefit calculation with 'Excess Income'

	Eligible Rent	Step 2		
Minus	Non-Dependant deduction for rent	Step 3		
Minus	65% of excess income	Step 6		
	Housing Benefit for Rent			
	Eligible Rates	Step 2		
Minus	Non-Dependant deduction for rates	Step 3		
Minus	20% of excess income	Step 6		
	Housing Benefit for Rates			