

Income Support (IS) & Income Based Jobseekers Allowance (JSA) Checklist

New claims post April 2004, age under 60

Clients's Name.....Date.....

Step 1: Check how much capital

£

Note: if more than the upper limit £16,000.00
no entitlement IS or income based JSA

Step 2: Work out applicable amount

Personal Allowance

Check out current **benefit rates**

Single parent/lone parent/couple (check age)

Premiums

Bereavement

Disability

Enhanced Disability

Severe Disability

Carer

Premiums Subtotal

Weekly eligible housing costs


Mortgage interest (check % payable)

Other costs

Minus any non dependant deduction

Weekly eligible costs subtotal

Applicable amount total



Step 3: Calculate income from ELB

In most cases this will be 42 weeks however this can be changed

Student Loan

Minus

Minus

Divided by

Student loan subtotal

Minus

Student loan total

Higher Education Bursary / Maintenance Grant

Divided by

Further Education Awards

Minus

Minus

Divided by

Further education total

Nursing Bursary

Minus

Minus

Divided by

Nursing bursary subtotal



| | | |
|--|--|--|
| Postgraduate Studentship and Cast awards | | |
| Minus | | |
| Minus | | |
| Divided by number of weeks | | |
| Postgraduate Studentship and Cast awards total | | |
| Other payments from ELB / Institution | | |
| Taken fully into account e.g. Adult dependance' grants and additions | | |
| Other payments from ELB total | | |
| Earned Income | | |
| Student | | |
| Parent | | |
| Minus Disregard | | |
| Earned Income Total | | |
| Benefit Income | | |
| Carers Allowance | | |
| Incapacity Benefit | | |
| Other Benefits | | |
| Benefit Income Total | | |

| Other Income | |
|--------------------------------------|--|
| Occupational Pension | |
| Tariff income from capital | |
| Maintenance payments | |
| Other | |
| Other Income Total | |
| Income from ALL sources total | |

| Step 4: Compare income to applicable amount | | |
|---|---------------|--|
| Applicable Amount Total | Step 2 | |
| Minus income from all sources | Step 3 | |
| Amount of Income Support/Income Based Jobseekers Allowance | | |
| If total in Step 3 is greater than Step 2 no Income support is payable | | |