

Age UK has designed a set of spreadsheets in which an adviser or an administrative worker records the practical gains (the tangible benefits of advice, e.g. additional money, reduced debt, receipt of services, etc.) achieved for individual clients. The tool will produce monthly, annual and year-to-date reports on all the practical gains achieved by your I&A service for enquiries relating to money and benefits, housing, community and health care, and services and consumer issues. The tools were primarily designed for Age UK or Age Concern I&A services that provide face-to-face advice, but they can also be used by Age UKs or Age Concerns that provide telephone advice.

These spreadsheets are unfortunately too large to load onto this website, but Age UK would be happy to email them in a zipped file to those who are interested.

Please email adviceunit@ageuk.org.uk if you would like to be sent the spreadsheets.



Money & Benefits			
All Money and Benefit Gains			
	Total Value		
Total financial value of Money and Benefit Gains	26391.88		
Total value of Actual Financial gains	25093.88		
Total value of Reimbursement	98.00		
Total financial value of other gains	1200.00		
Total Value of Grants	400.00		
Total Value of Grants, Loans and Concessions claimed to pay for services activities or goods.	0.00		
Total value of debts/fines/fees/arrears written off	1200.00		
Welfare Benefit Gains Only			
Positive Benefit Gains	Total Value	Confirmed	Estimated
Total amount of positive benefit claimed by all clients (new claims and increases BUT NOT backdated awards)	19977.88		
Total amount of positive AA Benefit	7425.60	7425.60	0.00
Total amount of positive DLA Care Benefit	3712.80	3712.80	0.00
Total amount of positive DLA Mobility Benefit	0.00	0.00	0.00
Total amount of positive HB/LHA Benefit	0.00	0.00	0.00
Total amount of positive CTB Benefit	855.40	855.40	0.00
Total amount of positive Single person rebate	0.00		
Total amount of positive Second adult rebate	0.00		
Total amount of positive PC (GC)/IS Benefit	6575.40	6575.40	0.00
Total amount of positive PC (SC) Benefit	1408.68	1408.68	0.00
Total amount of positive Carer's Allowance	0.00	0.00	0.00
Total amount of positive RP Benefit	0.00		
Total amount of positive Additional Pension	0.00		
Total amount of positive Winter Fuel Payments	0.00		
Total amount of positive Incapacity Benefit/ESA	0.00		
Total amount of positive Jobseekers Allowance	0.00		
Total amount of positive Tax Credits	0.00		
Total amount of positive Community Care Grant	0.00		
Total amount of positive Budgeting Loan	0.00		
Total amount of positive Crisis Loan	0.00		
Total amount of positive Funeral payment	0.00		
Total amount of positive Bereavement Allowance	0.00		
Total amount of positive Widowed Parents Allowance	0.00		
Total amount of positive Bereavement Payment (one off)	0.00		
Total amount of positive External Carers Allowance	0.00		
Total amount of positive External Carers Income Support/Pension Credit	0.00		
Total amount of positive External Carers Housing Benefit	0.00		
Total amount of positive External Carers Council Tax Benefit	0.00		
Total amount of positive External Carers Other Benefits	0.00		
Total amount of positive benefit claimed by clients/partners (new claims and Increases BUT NOT backdated)	19977.88		
Total amount of positive benefit claimed by external carers (new claims and Increases BUT NOT backdated)	0.00		
Number of Claimants	Total Number		
Total number of claimants (all clients)	5		
Total number of claimants AA Benefit	3		
Total number of claimants DLA Care Benefit	2		

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Housing Advice & Housing Options		
Housing Advice & Housing Options	Total Number	
Total number of housing advice and housing option practical gains	2	
Total number of homelessness, eviction & court action practical gains	0	
Total number of rented accommodation/landlord issues practical gains	2	
Total number of owner occupier practical gains	0	
Total number of housing option practical gains	0	
Total number of client receiving housing related appropriate information/advice	0	
Homelessness, Eviction & Court Action		
	Total Number	Total Amount
General Homelessness, Eviction & Court Action Gain	0	
Homelessness avoided	0	
Eviction avoided/ delayed	0	
Court action avoided	0	
Legal fine/court fees withdrawn	0	0.00
Other homelessness, eviction and court action practical gain	0	
Nature of other homelessness, eviction and court action practical gain.		
Rented Accommodation/Landlord Issues		
	Total Number	
General Rented accommodation/ Landlord Gain	0	
Repairs/improvements made	1	
Client re-housed	0	
Dispute resolved/mediated	1	
Tenancy secured	0	
Tenancy conditions improved	0	
Other rented accommodation/ landlord issue practical gain	0	
Nature of other rented accommodation/ landlord issue practical gain		
Owner Occupier Issues		
	Total Number	Total Amount
General Owner Occupier Gain	0	
Client accessed funding to deal with disrepair/modernisation	0	0.00
Client accessed funding to have improvements made to property	0	0.00
Client received Warmfront grant	0	0.00
Client supported to choose architect/tradesperson	0	
Client no longer paying for unwanted home maintenance protection insurance	1	
Other owner occupier issue practical gain	0	
Nature of other owner occupier issue practical gain.		
Housing Options		
	Total Number	
General Housing Options Gain	0	
Suitable housing option identified	0	
Client assisted to sell home	0	
Client assisted to move home	0	
Client downsized property	0	
Client moved into residential care	0	
Client moved into sheltered/ supported housing	0	
Client moved into rented accommodation	0	
Client assisted to move nearer to family/friends/carers	0	
Other housing options practical gain	0	
Nature of other Housing Options practical gain.		

Monthly Rpt Welfare Bens Monthly Rpt Other Money Monthly Rpt Other Gains RunningTotal Rpt - Welfare Bens Running Total Rpt - Other Money Running Total Rpt - Other Gains



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Other Money Gains			
Non Welfare Benefit Gains	Total Number		
Total Number of None Welfare Benefits Money practical gains	3		
Total number of Debt practical gains	2		
Total number of Grants and Payments practical gains	1		
Total number of Taxation practical gains	0		
Total number of Financial Products and Services practical gains	0		
Total number of clients receiving None Welfare Benefits Money related appropriate information/advice	0		
Debt Outcomes	Total Number		One Off Payments/Write Off
General Debt Gain	0		
Debt Rescheduled	0		
Debt reduced, waived or written off (Amount)	1		1200.00
Debts repaid	0		
Debt - Court action avoided	0		
Debt - Bailiff's action prevented	1		
Other debt practical gain	0		
Nature of other debt practical gain			
Grant and Payment Outcomes	Total Number	Annual Grant or Payment	One Off Payments/Write Off
General Grants & Payments Gain	0		
Charitable grant or payment -Weekly	0	0.00	
Charitable grant or payment - One Off	1		400.00
Client receiving grant from utility provider to meet bills - Weekly	0	0.00	
Client receiving grant from utility provider to meet bills - One Off	0		0.00
Client receiving any other grant - Weekly	0	0.00	
Client receiving any other grant - One Off	0		0.00
Client receiving discretionary housing payment	0		0.00
Insurance payout	0		0.00
Other grants and payments practical gain	0		
Nature of other grants and payments practical gain.			
Taxation Outcomes	Total Number		One Off Payments/Write Off
General Tax Gain	0		
Tax code corrected	0		
Client paying correct amount of tax	0		
Tax rebate	0		0.00
Outstanding tax bill reduced, waived or written off	0		0.00
Outstanding tax bill repaid	0		
Apology or explanation received from Inland Revenue	0		
Other tax practical gain	0		
Nature of other tax practical gain			
Financial Products/Services	Total Number		
General Financial Products/Services Gain	0		
Client opened a current account with a bank	0		
Client opened an account with a credit union	0		
Client opened a post office card account	0		
Client opened a savings account/product with a bank	0		

Print Sheet Monthly Rpt Welfare Bens Monthly Rpt Other Money Monthly Rpt Other Gains RunningTotal Rpt - Welfare Bens Running Total Rpt - Other Money