

# Notes to help you with your ILA Scotland Income Assessment

These notes are to help you fill in your income assessment form correctly. If you have any questions about the income assessment form or need more information or help then simply call the ILA Scotland helpline free on 0808 100 1090.

## What you need to do

- Read these notes carefully before you fill in your income assessment information.
- Please use a **black ballpoint pen** and give us all the details we ask for. Make sure that you sign and date the declaration box.
- Return the form to us in the envelope supplied or send it to ILA Scotland, PO Box 17277, Edinburgh, EH12 9GA.
- Please send us copies of all the documents we ask for as we won't be able to process your income assessment information without them. To protect your original documents, please send us photocopies if possible.
- You must tell us if there is any change in your circumstances that may affect any ILA Scotland funds due to you.
- If you need any help or advice about filling in your income assessment form you can give us a call free on **0808 100 1090**.

If you do not fill in the form correctly we may not be able to process the information.

## Note A: Your Personal Details

- A.1** This is your ILA Scotland account number. Please have this number handy if you call as it will help us to find your details more quickly.
- A.2-A.4** We have filled in these details using information you gave us over the phone or that we currently have in our system. If we need to contact you we will use these details, so please check them carefully. If any details are wrong please fill in the correct details in black ink in the space provided.
- A.5** If you have to change any of the details in A.2-A.4 then cross (x) the box and make any changes, as instructed, in the space provided.

## Note B: Details of Your Income

### Sections you must complete

- B.1** If your income is £22,000 a year or less, you will be eligible for ILA Scotland funding of up to £200 a year. If you receive any of the Benefits/Tax Credits listed under B.3-B.8, there is no need to complete this section. Otherwise, please provide details of your income.
- If you are paid monthly, send your three most recent payslips.
  - If you are paid weekly, send three payslips you have received in the last three months.
- or
- If you do not have three recent payslips, you can ask your employer to complete the Employer Certification of Income form.
  - If you are self-employed, you should still complete this question, and you will also need to complete the Certification of Self-Employed Income form. If you do not have an accountant you should write to us on your company letterhead confirming your income details.

The additional forms are both included with the income assessment form.

If you also receive a State pension please provide us with one of the following:

- a letter from the Department of Work and Pensions (DWP) confirming your pension
- a copy of your bank statement showing payment reference DWP – SP

If you also receive a private pension please provide us with the following:

- a copy of your most recent pension statement.

**Note: You do not need to fill in this section if you receive any of the Benefits/Tax Credits listed under B.3-B.8.**

**B.2** If you do not have any income of your own, you should cross (x) the box. We will contact you and you may be required to provide further evidence of your income status.

**B.3-B.8** Please mark the box with a cross (x) if you receive any of these Benefits or Tax Credits:

- Jobseeker's Allowance
- Income Support
- Employment and Support Allowance
- Carer's Allowance
- Pension Credit (also known as the State Pension Credit)
- Child Tax Credit (maximum rate).

If you receive more than one of the Benefits or Tax Credits, please cross (x) all the boxes that apply.

**We need to see evidence of your Benefit entitlement or Tax Credit. You can send:**

- your latest Benefit entitlement letter
- your most recent Tax Credit Assessment Notification.

You must send this with the income assessment form as we cannot process your assessment without this information. If for any reason you do not have your Benefit entitlement letter, you can ask the Jobcentre Plus office to complete the Confirmation of Benefit form included with the income assessment form. If you do not have your Pension Credit Award Notification you should contact your local Pension Service office and for your Tax Credit Assessment Notification, you should contact HM Revenue & Customs.

**We need your evidence of income information before we can process your income assessment. Clear unmarked photocopies are preferred.**

## Note C: Declaration and Undertaking

**C.1-C.2** Please read the declaration carefully and, when you are happy that your income assessment is complete and accurate, you should sign and date it. If you do not do this, we will have to return your income assessment form to you which will delay the processing of your information.

## Note D: Checklist

Please take a moment to run through the checklist provided on the income assessment form and check that you have included everything we need to process your income assessment.