**Initial Information Assessment Form**

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| **Applicant Name** |  | **Date Application Received**  |  |
| **Proposed retirement date**  |  | **Initial Banding ( pre home visit or tel con or office visit )**[[1]](#footnote-1) | **A** | **B** | **C** | **D** |
| **Ill health retirement** | Yes | No | **Death in Service** | **Yes** | **No** |
| **No of qualifying years Stipendiary Service at date of retirement** To qualify for assistance for housing under CHARM Rental the customer will have needed to complete the qualifying year of stipendiary service ( please see table below) |
| **Calendar year** | **2016** | **2017** | **2018** | **2019** | **2020** |
| **No of years qualifying service completed** | 12 | 13 | 14 | 15 | 15 |
| **Does Applicant meet qualifying service requirements** | **Yes**  | **No** | **Number of years service accrued** | **29** |
| **Financial Assessment** **Check**  | **Does Applicant have sufficient funds to be considered for Shared Ownership?** | **Eligible for CHARM Shared Ownership** | **Send shared ownership booklet & Letter** |
| **Yes** | **No** | **Yes** | **No** | **Yes** | **No** |
| **Eligible for Rental** |  **Contact Customer to arrange appointment to discuss application further**  | **Date contacted** |
| **Yes** | **No** | **Yes** | **No** | ***Insert date*** |
| **Appointment Booked**  | **Yes** | **No** | **Date of appointment**  | ***Insert date*** |
| **Confirm Appointment in email or writing to the customer [[2]](#footnote-2)** | *Date confirmation sent insert date* | **Book meeting room if internal appointment** | ***insert Room No*** |

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| **Banding Definitions** |
| Band AUrgent Priority | * Customer is less than 24 months from retirement and needs to secure a home
* Customer has an urgent medical condition, and their current housing is having a major adverse effect on the medical condition and their well being
* Customers’ partner has died in service and needs to move from the Vicarage in to permanent accommodation with the Board
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| Band BHigh Priority | * Customer is less than 36 months from retirement and needs to secure a home
* Customer needs to move because their home requires major repairs/ redevelopment and they are unable to occupy their current home while these works take place
* Customer has a medical condition, and their current housing is having an effect on their medical condition and well-being and they have a need to move.
* Customer is a Widow/er and would like to move following the death of their partner
* Customer has already retired, but is separating from their spouse/civil partner and one or both of them needs to be re-housed.
* Customer is residing in an adapted property where adaptations are no longer required by them and their family
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| Band CMedium Priority | * Customer is less than 48 months from retirement and needs to secure a home
* Customer is retired but living in House for Duty that they are required to leave in the next 12 months.
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| Band DLow Priority | * Customer is more than 48 months from retirement and needs to secure a home
* Customer is already housed in a CHARM property and would like to move but does not fall in to any of the priority categories
* Customer is retired, living in private rental accommodation and they do not need to move, but have expressed an interest in moving into CHARM Rental property
* Customer is ineligible for CHARM due to non qualifying service but would like to be considered for a commercially rented home
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1. Refer to banding criteria overleaf [↑](#footnote-ref-1)
2. [↑](#footnote-ref-2)