



hello

Customer Success Plan

For completion at Interview



Phone contact	Home no	Mobile no	Work no	Email
Applicant				
Partner				

Current address of household:	
Any member of the household at a different current address? If yes please state:	
Is anyone in the household pregnant?	
If yes when is the due date?	
Are any children in Care?	
What is the plan for these children?	

Do you have any long-term health conditions/medical problems? Please state:

Do you have any problems with drugs or alcohol:

Give details if methadone script/attending rehab etc:

Housing History:

Applicant - Where have you lived for the last 5 years?

Address	Landlord Details	Were you a tenant?	Temp or Perm	Date start	Date left	Reason for leaving?	Rent Arrears Owing?

Partner - Where have you lived for the last 5 years?

Address	Landlord Details	Temp or Perm	Date start	Date left	Reason for leaving?	Rent Arrears Owing?

Notes:

Do you own any property in the UK or overseas?

Please give details

Are you related to anyone that works for Curo?

Please give details

Are you an employee of Curo, or have been within the last year?

Please give details

Emergency contact:			Is this person also your next of Kin?			
Name	Address		Phone	Mobile Phone	Email	
Who is the person? (tick as applicable)	Family member	Friend	Social worker	Support Worker	Advocate	Other
We need your agreement to talk to this person. Can we tell them about:						
Any information about you or your tenancy?						
Non personal information about the property e.g. to arrange repairs						

Is support received from any of the following? [Tick relevant box]									
Social worker	Yes		No		Disability/illness	Yes		No	
Probation worker	Yes		No		Medical consultant	Yes		No	
Resettlement worker	Yes		No		Psychiatrist	Yes		No	
Drug/alcohol worker	Yes		No		Community Psychiatric Nurse	Yes		No	
Support worker	Yes		No		Other	Yes		No	
Who receives support in the household from those named above and what is the nature of the support? [name, address, phone no]									

Visiting	No special Requirement	Hearing loop	BSL Signer	Interpreter	Which language?	Male only	Female only
Applicant							
Partner							

Pets	
Do you have any pets?	Yes No
What are they?	
Will this breach the pets' policy? (Colleague only)	Yes No
If yes, would you be willing to re-home any of your pets if policy breached?	Yes No
If no, unable to proceed with application.	

Fire

Does anyone in the household smoke?

Does any member of the household have a disability?

Has any member of the Household been convicted of arson or arson with intent?

Do you use any specialist equipment?

Mobility scooter Oxygen Other, please state.

Do you need any adaptations to help you live in your home, e.g. rails or walk-on shower?

Have you ever been evicted, please state details:

Applicant

Partner

Do you have any rent debts (current or former):

Applicant

Partner

Have you previously been a tenant of Somer, Redland, Shape or Curo?

Applicant

Partner

Do you have any unspent convictions or regular police/probation involvement? If yes, give details.

Are you on bail or awaiting trial?	
Are you on probation?	
Are you on licence?	
Are you on a tag?	
Are you subject to an Injunction/ASBO/Non Molestation Order?	
Have you ever had any complaints made about the conduct of your tenancy, or been involved in any anti-social behaviour?	
Have you ever been convicted or served a custodial sentence?	
Was this in relation to offences carried out at or in the vicinity of your home	

What is your immigration status?

Applicant:		Partner:	
British national		British national	
EEC National		EEC National	
Permanent leave to remain		Permanent leave to remain	
Limited leave to remain		Limited leave to remain	

Homeless status of household:

Statutory Homeless and owed a main duty		Statutory Homeless and not owed a main duty	
Other homeless		Not homeless	

Money and Finances

Do you have a bank account?	
Who is it with?	
Are you using it all of the time?	
Do you regularly use an overdraft?	
Do you have, or will you be getting contents insurance, as Curo will not cover the cost of accidental damage or loss to your property?	

If you are working:

You:		Your partner:	
Job Title:		Job Title:	
Employers name:		Employers name:	
Employers address:		Employers address:	
Hours worked: Are these regular or varied?		Hours worked: Are these regular or varied?	

If you are not working: Curo can assist with getting you back into work and provide training, work experience and advice such as with CV's or interview skills.

You:		Your partner:	
How long have you been unemployed?			
What is preventing you from working?			
Would you like help to get back into work?			

Moving Costs

Are you considering taking out a loan for your move?

If yes, who with?

How much are you going to borrow?

How will you pay for:

Removals?

Carpets?

Curtains?

Phone Installation?

Cooker Installation?

Post Re-direction?

Furniture?

White Goods?

Estimated Cost of Move: £

Note: SOFA project offers low cost starter packs.

INCOME - money coming in		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes:
1	Your salary or wages (take home) When paid:					
2	Your Partner's salary or wages (take home) When paid:					
2a	Universal credit					
3	Other income					
4	Other Income					
	Total Salary / Wages					
	Monthly Total Salary / Wages					
Other income		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
5	Maintenance or child support					
6	Boarders or Lodgers					
7	Rent or "keep" from adults in household					
8	Student loans and grants					
9	Other					
	Total Other Income					
	Monthly Total Other Income					

Benefits		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
10	Jobseeker's Allowance (Income-based)					
11	Jobseeker's Allowance (Contribution-based)					
12	Income Support					
13	Working Tax Credit					
14	Child Tax Credit					
15	Child Benefit					
16	ESA / Statutory Sick Pay					
17	Incapacity Benefit					
18	DLA / Attendance Allowance					
19	Carer's Allowance					
20	Housing Benefit / Local Housing Allowance					
21	Council Tax Benefit/Support					
22	Other (e.g. Maternity Allowance / SMP, etc.)					
23	Other					
	Total Benefits					
	Monthly Total Benefits					

If you receive Universal Credit what date do you get paid?	
Do you have any deductions from your Housing Benefit or Universal Credit for: A previous over-payment of benefit Bedroom tax Benefits cap	
How much is being deducted each week for this?	

Pensions		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
24	State pension(s)					
25	Private or work pension(s)					
26	Pension Credit					
27	Other					
	Total Pensions					
	Monthly Total Pensions					
	Monthly Total Income					

Assets or equity		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
House or flat						
28	Total value of property(s) you own					
29	Mortgage outstanding					
30	Secured loan(s) outstanding					
	Total Equity					

Other assets		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
31	Value of vehicle(s) (less HP outstanding)					
32	Savings					
33	Other assets					
	Total Other Assets					
	Total Assets and Equity					

Expenditure - what you spend		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
34	Rent					
35	Ground rent and service charges					
36	Mortgage					
37	Other secured loans					
38	Mortgage Endowment / Mortgage PPI					
39	Buildings Insurance					
40	Contents Insurance					
41	Pension and life insurance					
42	Council Tax					
43	Gas					
44	Electricity					
45	Water					
46	Other utilities (coal, oil, calor gas)					
47	TV licence					
48	Magistrates / Sheriffs Court fines					
49	Maintenance or child support					
50	Hire Purchase / Conditional Sale					
51	Childcare costs					
52	Adult care costs					
53	Other					
54	Other					
55	Other					
	Total Essential Expenditure					
	Monthly Total Essential Expenditure					

Phone		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
56	Home phone					
57	Mobile phone					
58	Other phone					
	Total Phone					
	Monthly Total Phone					

Travel		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
59	Public transport (work, school, shopping etc.)					
60	Other (e.g. taxis)					
61	Car insurance					
62	Vehicle Tax					
63	Fuel (Petrol, Diesel, Oil etc.)					
64	MOT and car maintenance					
65	Breakdown or recovery					
66	Parking charges or tolls					
67	Other car costs					
	Total Travel					
	Monthly Total Travel					

Housekeeping		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
68	Food and milk					
69	Cleaning and toiletries					
70	Newspapers and magazines					
71	Cigarettes, tobacco & sweets					
72	Alcohol					
73	Laundry and dry cleaning					
74	Clothing and footwear					
75	Nappies and baby items					
76	Pet food					
77	Other housekeeping					
	Total Housekeeping					
	Monthly Total Housekeeping					

Other Expenditure		£ Weekly	£ Four Weekly	£ Monthly	£ Annual	Notes
78	Health (dentist, prescriptions, health ins)					
79	Repairs / house maintenance					
80	Hairdressing / haircuts					
81	Cable, Satellite and Internet					
82	TV, video and other appliance rental					
83	School meals and meals at work					
84	Pocket money and school trips					
85	Lottery and pools etc					
86	Hobbies / leisure (including pub/outings, gym etc)					
87	Gifts (Christmas, birthdays, charity etc)					
88	Vet bills and pet insurance					
89	Other (e.g. postage)					

90	Other (e.g. holidays)					
	Total Other Optional Expenditure					
	Monthly Total Other Optional Expenditure					
	Monthly Total Expenditure					

Debts

1st applicant loans/debts: Priority Debts (Rent, CTAX, Gas, Electric, Water, Fines, Child Support)				
Company	Amount owed	Weekly payment	4 weekly payment	Monthly payment
TOTAL:				

1st applicant loans/debts: Non-Priority Debt – Inc loans, credit/store cards, HP loans, catalogues, overdrafts.		
Company	Amount owed	Monthly payment
TOTAL:		

2nd applicant loans/debts: Non-Priority Debts – loans, credit/store cards, HP loans, catalogues, Overdraft.

Company	Amount owed	Monthly payment

2nd applicant: County Court Judgements/debt relief orders/ individual voluntary agreements or bankruptcy

County Court Judgements/ DRO/ IVA/ bankruptcy	Amount owed	Monthly payment	Date of order or Judgement	Amount written off (if applicable)

	£ Weekly	£ Four Weekly	£ Monthly	£ Annual	£ Other
Total Income					
Less Total Expenditure					
Less Total Debt Repayments					
Less Moving costs if loan					
Disposable income/deficit					

Please tick your preferred payment method			
Monthly Direct Debit	Weekly Direct Debit	Payment Card	Other (Please Specify)
Please Tick Your Preferred Payment Cycle:		Weekly	Monthly
What Is Your Preferred Payment Date?			

Requirements of Applicant Prior to Signing for Tenancy Agreement:

You will be required to pay your rent either up to the date that your direct debits (DD) starts (if you pay by DD), or four weeks in advance before keys can be released.

How will you fund this?

Please tick proof of address / ID / benefit

Bank Statement	<input type="checkbox"/>	Utility Bill	<input type="checkbox"/>	Wage slip	<input type="checkbox"/>	Driving Licence	<input type="checkbox"/>
JSA/IS	<input type="checkbox"/>	DLA/IB	<input type="checkbox"/>	Child Benefit	<input type="checkbox"/>	Tax credits	<input type="checkbox"/>
Passport	<input type="checkbox"/>	Birth certificate	<input type="checkbox"/>	Marriage Cert	<input type="checkbox"/>	Work permit/Visa	<input type="checkbox"/>
Proof of pregnancy	<input type="checkbox"/>						
Other :							

Curo will take necessary steps to ensure that opportunities for tenancy fraud are minimised by securing sufficient identification from the tenant at the start of the tenancy. This information will be kept on the tenancy file and will include at least one of the following:

- Photograph(s) of the tenant(s)
- Copy of passport/birth certificate
- Copy of child benefit details

We intend to take a photograph of the tenant(s) at the tenancy sign up which will be stored on the Housing Management system as a means of fraud prevention, as highlighted in the organisations Tenancy Fraud Policy and Lettings Policy. As personal data this will be held in accordance with Curo's Data Protection Policy.

Data protection act

Data protection information

We will hold and process the information you have given us in accordance with the Data Protection Act 1998. The information will allow us to improve and monitor our services to you and your household. It will also enable us to carry out our work and provide (with other organisations in some circumstances) the services that are appropriate to you. We might need to pass on information about you to other organisations which support or help you in your tenancy; to contractors who help us carry out our duties as a landlord; to statutory organisations and local authorities and to the police.

We adhere to the Data Protection Act in the way we process sensitive personal information that you have provided or will provide in the future. We will normally ask for your permission to collect, use and share personal information about you, except in the exceptional circumstances where it is necessary for us not to do so.

For all enquiries, or if you wish to view the information held by us please contact 'The Data Protection Officer' at Curo, River Place, Lower Bristol Road, BATH, BA2 1EP.

Name and address of current landlord:

Applicant[s] verification

I/we confirm that I/we are content for Curo to collect, hold, use and share personal information about me/us in the way described above.

Passport to Housing clients only: Citizens Advice Bureau (CAB) have carried out this interview on behalf of Curo. I/we confirm that I/we are content for CAB to collect, hold, use and share personal information about me/us in the way described above and understand that a copy of this form will be passed to Curo and reviewed as part of their lettings process.

I/we confirm that the details on this interview form are correct and I / we understand the Data Protection statement above.

I/we understand that if any of the information supplied is found to be false or something important is omitted, then my/our application for housing may be refused or any offer of accommodation may be withdrawn.

I / we give permission for Curo to contact my previous landlord, anyone providing support, or any relevant statutory agency for information regarding my/our ability to manage a tenancy. I further give permission for Curo to perform a credit check using a credit reference agency.

Signed:.....
[Applicant]

Name [print]:

Current Address:

Signed:.....
[Joint applicant]

Name [print]:

Date:

Signed:.....
[Officer]

Name [print]:



