User Guide

Better off calculator
Contents

About this guide ............................................................................................................................... 3
Getting started.................................................................................................................................. 3
Saving a calculation ........................................................................................................................ 5
Retrieving a saved calculation .................................................................................................... 6
Results page ...................................................................................................................................... 6
Better off calculator........................................................................................................................ 7
Creating a budget .......................................................................................................................... 11
Accessing the administration area .......................................................................................... 12
Admin area: start calculation .................................................................................................... 13
Admin area: calculations ............................................................................................................ 13
Admin area: configurator .......................................................................................................... 17
Admin area: setup emails .......................................................................................................... 20
Admin area: usage statistics ...................................................................................................... 22
Admin area: client settings ........................................................................................................ 22
Further information ..................................................................................................................... 24
About this guide

This guide is designed for entitledto clients that use the entitledto better off calculator. It will guide users through the process of carrying out calculations and accessing and utilising the admin features of the product.

Getting started

The better off calculator can be accessed by opening an internet browser on your device and entering the website address provided to your organisation. All you need to access the better off calculator is an internet connection.

The better off calculator homepage will be branded to your organisation:

![Benefits calculator](image)

The user can start the calculation by pressing the ‘Start’ button on the page.

**Tip:** If you would like to view the better off calculator as an administrator to access additional functions see the “Administration area” section of this guide.

Once you press the ‘Start’ button you will be taken to the first page of the calculation.
The better off calculator asks a series of questions, but the calculator is responsive and you are only shown pages that are relevant based on your answers to the questions. Mandatory questions are marked with an asterisk (*) and these must be answered.

The questions and layout are designed to be simple and straightforward. If a user needs more information about the question they can click on the blue icon and a help page will be shown providing further detail.
Not British or Irish

If you are not a British or Irish national you may not be able to claim benefits in the United Kingdom. This page may direct you to further advice pages depending on which of the categories below you fall into.

The entitledto calculator does not work out whether you meet the conditions for claiming benefits, you may need to seek specialist advice on this.

EEA nationals

If you are an 'EEA national' or 'family member of an EEA national' living in the United Kingdom you may be entitled to claim benefits. Your entitlement to benefits is determined by European Union legislation and case law that applies throughout the European Economic Area. Your rights to various benefits will be determined by a number of 'Tests for Entitlement'. The most important test is the 'Habitual Residence Test'.

Saving a calculation

Every time you click on the 'Next' button at the bottom of the page the answers for that page are saved. This means that you can stop a calculation at any point, make a note of your calculation reference shown above the 'Save' button and return to it later without having to start again.

To save your calculation you can also click on the 'Save' button.

This will take you to a page which contains your reference ID. You will need to make a note of this reference ID as you will need it to retrieve the calculation.
Retrieving a saved calculation

To retrieve a saved calculation, press the ‘Saved calculations’ link shown at the top of the home page below.

This will open the ‘Retrieve your calculation’ page, enter your reference ID here and your calculation will be opened where you were up to.

Results page

When each page of the better off calculator has been completed you will end on a results page. The results page shows all the benefits the calculator has found you may currently be entitled to based on the information you have entered.
Better off calculator

Our better off calculator will now check how starting a new job, or increasing your hours/wage, would affect your benefit entitlement. Simply enter the hours and wage rate of the potential job and click calculate to get the better off result.

![Image of calculator interface]

**How much better off would you be in work?**

To see how much better off you would be in work we need details of the job you are thinking about. We will use this information to calculate how much you will earn after tax and if you qualify for in-work benefits and tax credits.

- **Hours worked:** 30 per week
- **Wage rate:** £7.50 per hour

**Calculate entitlement to Universal Credit?**
- Yes
- No

You cannot make a new claim for Working Tax Credit after the Universal Credit Full Service live date of October 2017. For more information please see Universal Credit roll out.

**You could be £199.59 per week better off in work**

<table>
<thead>
<tr>
<th>Income</th>
<th>Current Income</th>
<th>Income in Work</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobseeker’s Allowance</td>
<td>£73.10</td>
<td>£0.00</td>
<td>-£73.10</td>
</tr>
<tr>
<td>Council Tax Support</td>
<td>£16.07</td>
<td>£0.00</td>
<td>-£16.07</td>
</tr>
<tr>
<td>Housing Benefit</td>
<td>£184.59</td>
<td>£226.30</td>
<td>+£41.70</td>
</tr>
<tr>
<td>Tax Credits</td>
<td>£0.00</td>
<td>£31.10</td>
<td>+£31.10</td>
</tr>
<tr>
<td>Client Earned Income (net)</td>
<td>£0.00</td>
<td>£215.95</td>
<td>+£215.95</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>£273.76</strong></td>
<td><strong>£473.35</strong></td>
<td>+£199.59</td>
</tr>
</tbody>
</table>

*Based on you working 30 hours per week and earning £7.50 per hour (estimate does not include travel costs).*

[Download PDF] [Email PDF] [Show graph] [Show slider]
Once you have carried out a better off calculation you have several options.

You can download a PDF of your better off results table or email it to any email address.

You can select ‘Show graph’ to see a visual representation of the impact on your benefits of moving in to work. Click on the cog icon to choose a different type of graph or adjust the values used for the earnings axis.
You can select ‘Show slider’ to quickly see what would happen to the entitlements if the wage rate was to change - assuming the number of hours originally entered remains the same.

![Show slider](image)

<table>
<thead>
<tr>
<th>INCOME</th>
<th>PER WEEK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in weekly earnings</td>
<td>£0.00</td>
</tr>
<tr>
<td>Housing Benefit</td>
<td>£226.30</td>
</tr>
<tr>
<td>Council Tax Support</td>
<td>£0.00</td>
</tr>
<tr>
<td>Working Tax Credit</td>
<td>£31.10</td>
</tr>
<tr>
<td>Total Benefits</td>
<td>£257.40</td>
</tr>
<tr>
<td>Net Earnings</td>
<td>£215.95</td>
</tr>
<tr>
<td>Total Income</td>
<td>£473.35</td>
</tr>
</tbody>
</table>

To change the number of hours you will need to start a new better off calculation by clicking on

![New better-off calculation](image)

You can carry out and save multiple better off calculations for comparison.

To see all previous better-off calculations for comparison you can select the ‘Previous Better-off Calculations’ option, this will reveal a summary table.

<table>
<thead>
<tr>
<th>Previous Better-off Calculations</th>
</tr>
</thead>
<tbody>
<tr>
<td>CALC. NAME</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>Current income</td>
</tr>
<tr>
<td>Tesco</td>
</tr>
<tr>
<td>Aldi</td>
</tr>
<tr>
<td>Sainsbury's</td>
</tr>
</tbody>
</table>
There is also a Universal Jobmatch feature accessed by selecting ‘Show Job Search’. The postcode from the benefit calculation will be prefilled so just enter a job title or skill/keyword and click ‘Search for jobs’ and any matches will be returned. A link to the job advert on the government’s job search website is included.

Information you provided

The information you provided accordion allows the user to see all the answers given during the calculation process so they can check the details the results are based on.
Creating a budget
Pressing the ‘Launch’ button opens the People Plus on-line budgeting tool to help households understand the implications of changes in their finances.

The current benefit entitlements and other information such as rent and council tax will be carried over from the calculator.
Accessing the administration area

To access the admin area of the better off calculator you will need to login by clicking on the 'log in' button (located in the top right hand corner of every page of the calculator) and entering the user name and password that will have been provided to you by entitledto.

Once you have logged in you will see your username in the top right-hand corner of the page.

Click on the cog next to your username to reveal a ‘Go to admin’ link to access the admin area.

The options that are visible on the admin area dashboard will be determined by the privileges associated with your account type.
Admin area: start calculation

If you click on ‘Start calculation’ you will be redirected to the Start page of the calculator to create a new benefit calculation.

Admin area: calculations

If you select ‘Calculations’ you can view all calculations created on your site within a calculations table.
The table is automatically set to display all calculations created within the current calendar month.

The user name of the person who carried out the calculation will be ‘public user’ if the calculation was carried out by someone who wasn’t logged in.

The ‘Calculation’ column contains a PDF icon which can be clicked to view the results PDF for the calculation or you can click on the link icon in the ‘Calculation URL’ column to be taken to the results page of the calculation.

If the ‘x’ in the ‘Delete’ column is clicked a message will appear to ask if you are sure before the calculation is deleted.

**Personalising the calculations table**

Additional columns can be shown in the calculations table to suit your preference. To add extra columns, click on the ‘choose columns’ button and tick the items you’d like to see displayed in the table. Each heading shown below expands to reveal different items that are available to be displayed in the table; this covers most things that we capture during the calculation, from entitlements to information about the household.
You can only search for a calculation using information that is visible in your table, for example, you can only search for a calculation by postcode if you have the postcode column displayed. It is important to consider this when choosing which columns to display.

Once you have selected the columns you want shown in the table press the ‘Submit’ button and the table will be updated.

**Filtering the calculations displayed**

You can use the ‘Filter’ field to search for a calculation but you can only search using information that is visible in your calculations table, for example, the Reference ID column will need to be displayed if you wish to search for a calculation by Reference ID.

To view calculations that took place over a specific period, tick the checkbox next to each date filter and change the dates to the required start and end dates for the period wanted. You can use the calendar icon to select from the calendar as shown below. The table will update as soon as a new date is entered.
Number of calculations to display

You can set the number of calculations to be shown on the page using the drop-down menu beneath the table and navigate between pages using the page navigation bar shown in green below. You will also see a summary here telling you how many calculations are being shown out of the total number of calculations that fit the filters currently selected.

Producing reports

At the bottom of the Calculations page there is an Excel icon which when clicked will export the data currently visible within the table to an Excel file. If your filtered calculations run over more than one page be sure to select ‘Show all calculations per page’ if you want them all included in the export.

Viewing calculations from other tools

If you have subscribed to more than one entitledto tool, for example, the better off calculator and the affordability calculator, the calculations page can be set up to show calculations from any of your tools to save you having to log in to the admin area of each one separately.

To access calculations from a different tool to the one you are logged in to simply tick the check box next to ‘Show Mode Filter’. A ‘Mode’ dropdown menu will appear and you can choose the tool you want to view calculations for. This filter is only relevant if you subscribe to multiple entitledto tools. The better off calculator does not
have its own entry in the mode drop down, it comes under ‘Means-tested benefit
calculator’.

Admin area: configurator

In the ‘Configurator’ section you can amend the text shown within the better off
calculator.

The text management table shows all the text within the better off calculator that is
available for editing by an administrator. You will be asked to enter your name in the
‘Editor name’ box before making any changes.

Each piece of text within the calculator, whether it is a heading or a message, has an
identifying ‘key’; this key is shown in the first column of the table alongside its
associated text in the second column of the table. The Site mode column contains a
reference to the tool being used. If a piece of text has been edited previously you will
be able to view details of the change, who made it and when, via a link in the edit
history column.
You can change any piece of text within the text management section by clicking on the key. A text box will appear so you can change the text and it will be saved when you click 'close'.

If you want to locate a specific piece of text within this section that needs updating you can type a key word or sentence from the text into the filter box at the top and the piece of text will be located for you so you can edit it.
If you would prefer to edit text directly when on the better off calculator pages, you can select ‘Edit text - form view’ shown in red below.

You will be redirected to the home page of your better off calculator which will now be in ‘edit mode’.

To edit a piece of text you need to click on the pencil icon next to it and a text box will appear.
You will need to enter your name and then you can make any text changes within the ‘Value’ box before clicking ‘Ok’. The change can be seen on the page immediately.

**Tip:** You can access this method of editing text without going through the **admin area**. From any page of the calculator, simply select the cog next to your username when logged in and slide the Edit mode slider to ‘On’. You can also turn the edit mode off again using the slider here.

Admin area: setup emails

There are several email templates that can be edited within this section - which is only available to administrator level users.

For example, you can create the content for the email which is sent when someone clicks the ‘forgotten password’ link on the login page shown below.
Within each email template there are ‘placeholders’ you can insert which will be replaced with the appropriate values from the relevant calculation. For example, this could be useful if you want to share the results page URL as part of the email or the reference ID to help the recipient access the calculation quickly.

You can use next placeholders which would be replaced with the appropriate values:

- ```###cid### - calculation Id```
- ```###url### - current result page URL```
- ```###refid### - calculation reference Id```
- ```###altrefid### - calculation alternative reference Id```
- ```###user### - current user name```
- ```###office### - current office name```
- ```###address### - calculation address```
- ```###notes### - calculation notes```
- ```###housingstatus### - housing status```

Also on this page you can tick the checkbox shown below so that an administrator can be notified by email each time a user completes a calculation. You can provide the administrator’s email address in the ‘Organisation emails’ field for receiving these notifications.

You will need to click ‘Save’ to save any changes made on this page.
Admin area: usage statistics

![Usage stats]

This area is only available for administrator level users. Here you can see the following usage statistics.

![Usage statistics]

You can filter calculations by date to check usage statistics over a certain period, simply click in the date box or on the calendar icon.

Admin area: client settings

![Host Settings]

In this section entitledto can manage settings for the client. From here a site can be put in Beta mode.

<table>
<thead>
<tr>
<th>Host Url</th>
<th>peopleplusaffordability.entitledto.co.uk</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Beta Mode</td>
<td>☐</td>
</tr>
</tbody>
</table>
When in beta mode, a red stripe ‘Beta’ will be shown at the top left corner of the calculator page and down the left side a vertical ‘Send feedback’ button will be displayed.

With the following feedback form users can leave their feedback after using the calculator.
Further information

This guide is designed to guide you through using the better off calculator. Should you require further assistance you may also like to try the following:

- Email us at info@entitledto.co.uk
- Sign up to the customer newsletter for latest updates and information.

Please also contact us if you would like us to produce user guides or if you would like us to add information to this user guide.