

Help with Family Mediation

This form, signed by the mediator, must be held on file in order to be able to make a claim for help with family mediation. If the enhanced fee for preparation of a consent order is claimed a copy of the mediation agreement/Memorandum of Understanding and copy of the consent order should also be held on the file.

	ities Monitoring n your client would describe themselves as being	ng:
Ethnicity		
White	Mixed	Asian or Asian British
(a) British	\square (a) White and Black Caribbean	\square (a) Indian
(b) Irish	(b) White and Black African	☐ (b) Pakistani
\square (c) White Other	\square (c) White and Asian	(c) Bangladeshi
Black or Black British	(d) Mixed Other	(d) Asian Other
(a) Black Caribbean	☐ Chinese	Other
(b) Black African	Gypsy/Traveller	☐ Prefer not to say
(c) Black Other		
Disability		
•	es disability as: a physical or mental impairme	nt which has a substantial and
	a persons ability to carry out normal day-to-day	
Not Considered Disabled		
If a client considers himself	or herself to have a disability please select the	most appropriate definition.
Definitions:		
Mental health condition	Blind	
Learning disability/difficulty	☐ Long-standing physical	illness or health \square
Mobility impairment	condition	
Deaf	Other	
Hearing impaired	Unknown	
Visually impaired	Prefer not to say	
4 Completion of this section purely for statistical monit	is voluntary. This will be treated in the stricter oring and research.	st confidence and will be used
Your client's de	tails	
Title: Initials: S	Surname:	
First name:	Surname at birth:	
Date of birth://	(if different) National Insurance no:	
Sex: 🗌 Mal	e	er not to say
Marital status: Single	e Married/Civil Partner	Cohabiting
Sepa	rated Divorced/dissolved CP	Widowed
Place of birth: (town)	Job:	
Current address		
	Postcode:	

Type of me	ediatio	on:
		(Child Only, Property & Finance or All Issues)
Signed		Mediator Date:/
Name of re	ecogn	ised Mediator(s):
Name of S	ervice	:
Mediation	Acco	unt Number:
Address o	f Serv	vice:
		Postcode:
Financ	ial	Eligibility
1. The cl	ient is	s a child under the age of 18:
	Yes	Go to question 2.
	No	Go directly to question 5 to continue assessment.
2. The ch	nild's	means are to be aggregated with a maintaining adult:
	Yes	Go directly to question 5 to continue assessment.
	No	Go to question 3.
earnin	gs (le	hild receive any money on a regular basis? Do not include any part-time ess than 16 hours per week), holiday jobs, pocket money, or any se that you get for the child.
	Yes	Go directly to question 5 to continue assessment.
	No	Go to question 4.
4. Does t	this C	hild have any savings, items of value or investments totalling £2,500 or more?
	Yes	Go to question 5 to continue assessment.
	No	Go to note 1 below
Note 1		

Financial E	Eligibility continued		
5. The client h	as a partner whose means are to be aggregated:		
☐Yes	Please provide details of both client's and partner	er's means.	
□No	Please provide details of client's means only.		
6. The case is	about ownership or possession of assets and / o	r financial provisio	n:
☐Yes	Go to question 7.		
□No	Go directly to Part B Capital.		
7. The client's	assets (held in sole name or jointly held) have be	een claimed by the	e opponent:
☐Yes	Please complete Part A Capital - Subject matte	er of dispute.	
□No	Go directly to Part B Capital.		
by the oppo	matter of dispute disregard only applies to asset onent. All assets that have not been specifically of in Part B Capital.		•
•	oital - Subject matter of dispute property, assets or possessions that the opponen	•	m to in this case: Other property
	Current market value	£	
	Outstanding Mortgage/secured loan	£	
2. Is property hel	d in joint names with the opponent?	☐Yes	□Yes
4 If property is	held in joint names with the opponent, equal ormally be assumed for assessment purposes.	□No	□No
		1	

Part A: Capital - Subject matter of dispute (SMOD) continued

- 3. Client's share of property for assessment?
 - 4 Enter 50% when property is jointly owned with opponent. Select 100% when property is solely owned by client or jointly with partner. Enter an appropriate % if another party has an interest.
- 4. Total Net Equity (i.e. current market value minus mortgage disregard):
 - 4 Deduct the full amount of any debt secured by a mortgage or charge on the property.
- 5. Client's share of Total Net Equity:
 - 4 Multiply answer to question 4 by answer to question 3.
- 6. Final assessed amount of Client's equity:
 - 4 Calculated by applying the SMOD disregard; followed by the equity disregard of £100,000 to the main home.
 - 4 The maximum SMOD disregard is £100,000.
 - 4 The SMOD disregard must be applied to the main home first (i.e. deducted from the client's share of total net equity shown as answer to question 5); any remainder (i.e. only if client's share of total net equity in main dwelling is less than £100,000) should then be applied to other property.
 - 4 You must not reverse the order of the disregards
- 7. Other assets and possessions claimed by the opponent:

Savings (bank, building society, etc)

Investments (shares, insurance policies, etc)

Valuable items (boat, caravan, jewellery, etc)

Other capital (including money due to the client)

Total capital Part A

- 4 This is the total capital amount after applying the SMOD disregard of £100,000 to the assets in this section.
- 4 If there are no SMOD property assets, apply the full £100,000 SMOD disregard to the assets set out in question 7 above.

	% _	%
£		
£		
£		
	-	

Other property

Main home

CI	ient and Partner
£	
£	
£_	
£	
t	

Part B: Capital

4 Please list all client's and partner's property, assets or possessions not included in Part A.

4 Capital excludes household furniture and effects (unless exception tools of trade.	onal value), cloth	es and
1. Property:	Main home	Other property
Current market value:		
Outstanding Mortgage/secured loan:	£	
2. Is property held in joint names with the opponent?	Yes	□Yes
4 If property is held in joint names with the opponent, equal shares will normally be assumed for assessment purposes.	□No	□No
3. Client's share of property for assessment:	%	<u> </u>
4 Enter 50% when property is jointly owned with opponent. Select 100% when property is solely owned by client or jointly with partner. Enter an appropriate % if another party has an interest.		
 Total Net Equity (i.e. current market value minus mortgage disregard): 	£	
4 Deduct the full amount of any debt secured by a mortgage or charge on the property.		
5. Client's share of Total Net Equity:	£	
4 Multiply answer to question 4 by answer to question 3.		
 Final assessed amount of Client's equity: 4 After applying equity disregard of £100,000 to client's share of total net equity in main home (shown as answer to question 5). 	£	
7. Other assets and possessions:	Client	Partner
Savings (bank, building society, etc)	£	£
Investments (shares, insurance policies etc)	£	£
Valuable items (boat, caravan, jewellery, etc)	£	£
Other capital (including money due to the client)	£	£
Total capital Part B	£	
Total of all capital assets (Part A and Part B)	£	

Part C: Income			
	directly in receipt of Income Support, I ent and Support Allowance or Guaran		bbseeker's Allowance,
Yes Go directly to the Evidence section on page 7.			
☐ No Con	tinue with income details.		
	iply by 52 & divide by 12) multiply by 13 & divide by 12)		
Income includes:		Client	Partner
4 Gross monthly earn	ings	£	_ £
4 Other income (including child benefit, pensions, maintenance, dividends, tax credits, benefits in kind, etc)		£	_ £
	Total gross income	£	_ £
Total g	ross income (Client and Partner)	£	
Less monthly allowand 4 Housing costs, inclu Mortgage instalmen		£_	_ £
Rent* (capped if client		£	£
`	e net of housing benefit		
4 Dependents' allowa	nces:		
·	Partner	£	_
Dependents	Aged 15 and under	£	_
	Aged 16 or over	£	_
4 Tax and National Insurance		£	_ £
4 Standard allowance	for employment expenses	£	£
4 Maintenance payments actually being made		£	_ £
(eg for children and/or a former/separated spouse)4 Childcare costs because of work/self employment		£	_
Payment of income contribution order (criminal legal aid)		£	_ £
	Total allowances	£	_ £
7	Total monthly disposable income	£	£
-	Fotal monthly disposable income (Client and Partner)	£	

Means assessment completed using the Check if your client qualifies for legal aid (CCQ) service. **Evidence** Evidence given in support of means Yes you will need to complete No \lceil the evidence checklist on page 14. If no, please record justification or exceptional circumstance.

is assessment completed using the Check if your client qualifies for legal aid (CCQ) service.
Client's Certification Please tick the box below which applies to you:-
I have not already received help with family mediation/family help (lower) from a solicitor or contracted provider on this matter within the previous 6 months.
I have already received help with family mediation/family help (lower) from a solicitor or contracted provider on this matter. If so, please state when.
As far as I know all the information I have given is true including information as to my means and I have not withheld any relevant information.
I understand that I must tell you immediately if there are any changes in my or my partner's financial circumstances.
I agree to the LAA checking these facts with other parties such as the Department of Work and Pensions (DWP) and the HM Revenue and Customs (HMRC) and I authorise those parties (including HMRC and DWP) to provide the information they are asked for.
I understand that if I give false information or withhold any relevant information the services provided to me may be cancelled at which point I will become liable to pay all the costs that have been incurred and I may be prosecuted.
Signed: Date:
This is a true statement of all my income and assets in the UK and abroad. I agree to the LAA checking these facts with other parties such as the Department of Work and Pensions (DWP) and the HM Revenue and Customs (HMRC) and I authorise those parties (including HMRC and DWP) to provide the information they are asked for.
Signed: Date:
Help with Family Mediation Tick the relevant box if you have: 4 Travelled out of the office to visit the client, other than at court.
4 Accepted an application form a child or patient or someone on their behalf.
4 Provided help with family mediation to a client who has already received family help (lower) or help with family mediation on the same matter within the last 6 months.
4Given telephone advice by you or your firm before the signature of the form.
4 Claimed for outward travel before the signature of the form.
4 Accepted a postal application.
If you have ticked any of the above boxes please provide the circumstances justifying this in accordance with the relevant Rule in the contract Specification.
Are the relevant criteria in the Civil Legal Aid (Merits Criteria) Regulations 2012 for help with family mediation met and does the case satisfy the conditions as set out in the family specification to provide help with family mediation? YesNo

LEGAL AID AGENCY PRIVACY NOTICE

Purpose

This privacy notice sets out the standards that you can expect from the Legal Aid Agency when we request or hold personal information ('personal data') about you; how you can get access to a copy of your personal data; and what you can do if you think the standards are not being met.

The Legal Aid Agency is an Executive Agency of the Ministry of Justice (MoJ). The MoJ is the data controller for the personal information we hold. The Legal Aid Agency collects and processes personal data for the exercise of its own and associated public functions. Our public function is to provide legal aid.

About personal information

Personal data is information about you as an individual. It can be your name, address or telephone number. It can also include the information that you have provided in a legal aid application such as your financial circumstances and information relating to any current or previous legal proceedings concerning you.

We know how important it is to protect customers' privacy and to comply with data protection laws. We will safeguard your personal data and will only disclose it where it is lawful to do so, or with your consent.

Types of personal data we process

We only process personal data that is relevant for the services we are providing to you. The personal data which you have provided in your legal aid application will only be used for the purposes set out below.

Purpose of processing and the lawful basis for the process

The purpose of the Legal Aid Agency collecting and processing the personal data which you have provided in a legal aid application is for the purposes of providing legal aid. Our lawful basis is 'the performance of a task carried out in the public interest or in the exercise of official authority' as set out in Article 6(1)(e) of UK GDPR. The tasks are those set out in the Legal Aid, Sentencing and Punishment of Offenders Act 2012. Specifically, we will use this personal data in the following ways:

- In deciding whether you are eligible for legal aid, whether you are required to make a
 contribution towards the costs of this legal aid and to assist the Legal Aid Agency in
 collecting those contributions, if appropriate.
- In assessing claims from your legal aid Provider(s) for payment from the legal aid fund for the work that they have conducted on your behalf.
- In conducting periodic assurance audits on legal aid files to ensure that decisions have been made correctly and accurately.
- In producing statistics and information on our processes to enable us to improve our processes and to assist us in carrying out our functions.

Were the Legal Aid Agency unable to collect this personal information, we would not be able to conduct the activities above, which would prevent us from providing legal aid.

We collect 'special categories of personal data'. This data is collected where necessary for the purposes set out above. The condition under which we process this data is Article 9(g) of UK GDPR – Reasons of substantial public interest. Our associated Schedule 1 condition is Statutory and Government purposes. We also collect this data for the purposes of monitoring equality, this is a legal requirement for public authorities under the Equality Act 2010. Special categories of personal data will be treated with the strictest confidence and any information published under the Equality Act will not identify you or anyone else associated with your legal aid application.

We collect 'personal data relating to criminal convictions and offences or related security measures'. This data is collected where relevant for the purposes set out above. The Legal Aid Agency is an Executive Agency of the MoJ, an Official Authority for the purposes of Article 10 of UK GDPR.

Who the information may be shared with

We sometimes need to share the personal information we process with other organisations. When this is necessary, we will comply with all aspects of the relevant data protection laws. The organisations we may share your personal information include:

- Your instructed legal aid Provider(s), including any advocate instructed by a legal aid solicitor;
- Public authorities such as: HM Courts and Tribunals Service (HMCTS), HM Revenue and Customs (HMRC), Department of Work and Pensions (DWP), Home Office and HM Land Registry;
- Non-public authorities such as: Credit reference agencies Equifax and TransUnion and our debt collection partners Marston Holdings
- If false or inaccurate information is provided or fraud identified, the Legal Aid Agency can lawfully share your personal information with fraud prevention agencies to detect and to prevent fraud and money laundering. We may specifically share data with HMRC and DWP for fraud prevention, investigation and prosecution purposes; and
- Where a debt is owed to the Legal Aid Agency, we may share your data with public authorities such as HMRC and DWP and with debt collection partners such as Marston Holdings for the purposes of tracing, debt collection and enforcement.

You can contact our Data Protection Officer for further information on the organisations we may share your personal information with.

Data Processors

We may contract with third party data processors to provide email, system administration, document management and IT storage services. Any personal data shared with a data processor for this purpose will be governed by model contract clauses under data protection law.

We contract with Marston Holdings as a data processor for the collection and enforcement of criminal legal aid contributions. Any personal data shared with the data processor for this purpose is governed by model contract clauses under data protection law.

Automated decision making

We do not use solely automated decision making within the definition of Article 22(1) of UK GDPR. The overall decision on an application for legal aid or a claim for costs in a legal aid case will always be made by a human decision maker. This could be a member of our staff, or a staff member of a legal aid Provider acting under delegated authority from the Legal Aid Agency.

Details of transfers to third country and safeguards

Personal data may be transferred to locations in the European Economic Area (EEA) where required by our data processors for hosting, storage and secure backup of our IT services. Such transfers are made on the basis of Adequacy decisions between the UK and EEA in accordance with Article 45 of UK GDPR.

In limited and exceptional circumstances, where required for the provision of technical support, personal data stored in our call centre software may be accessed by support staff located in USA, Romania, Philippines, Singapore or Australia. Where transfers for this purpose are made to locations without Adequacy decisions the transfer is made on the basis of exceptions under Article 49 of UK GDPR and is required for the legitimate interests of the Ministry of Justice. The software provider maintains the same standards of IT and personnel security for its services overseas as it does for services in the UK.

Retention period for information collected

Your personal information will not be retained for any longer than is necessary for the lawful purposes for which it has been collected and processed. This is to ensure that your personal information does not become inaccurate, out of date or irrelevant. The Legal Aid Agency have set retention periods for the personal information that we collect, this can be accessed via our website:

https://www.gov.uk/government/publications/record-retention-and-disposition-schedules

You can also contact our Data Protection Officer for a copy of our retention policies.

While we retain your personal data, we will ensure that it is kept securely and protected from loss, misuse or unauthorised access and disclosure. Once the retention period has been reached, your personal data will be permanently and securely deleted and destroyed.

Access to personal information

You can find out if we hold any personal data about you by making a 'subject access request'. If you wish to make a subject access request please contact:

Disclosure Team - Post point 10.25 Ministry of Justice 102 Petty France London SW1H 9AJ

Data.access@justice.gov.uk

When we ask you for personal data

We promise to inform you why we need your personal data and ask only for the personal data we need and not collect information that is irrelevant or excessive.

When we collect your personal data, we have responsibilities, and you have rights, these include:

- That you can withdraw consent at any time, where relevant;
- That you can lodge a complaint with the supervisory authority;
- That we will protect and ensure that no unauthorised person has access to it;
- That your personal data is shared with other organisations only for legitimate purposes;
- That we don't keep it longer than is necessary;
- That we will not make your personal data available for commercial use without your consent; and
- That we will consider your request to correct, stop processing or erase your personal data.

You can get more details on:

- Agreements we have with other organisations for sharing information;
- Circumstances where we can pass on personal information without telling you, for example, to help with the prevention or detection of crime or to produce anonymised statistics;
- Our instructions to staff on how to collect, use or delete your personal information;
- How we check that the information we hold is accurate and up-to-date; and
- How to make a complaint.

For more information about the above issues, please contact the;

The Data Protection Officer Ministry of Justice 102 Petty France London SW1H 9AJ

dataprotection@justice.gov.uk

Complaints

When we ask you for information, we will comply with the law. If you consider that your information has been handled incorrectly, you can contact the Information Commissioner for independent advice about data protection. You can contact the Information Commissioner at:

Information Commissioner's Office Wycliffe House Water Lane Wilmslow Cheshire SK9 5AF

Tel: 0303 123 1113 www.ico.org.uk

Certification
I certify that:

4 I have taken all reasonable steps to ensure my client has completed the financial eligibility questions fully and accurately. I have applied the Civil Legal Aid (Financial Resources and Payment for Services) Regulations 2013 to the information supplied by my client and assessed my client as being eligible for legal aid in this matter.

4 I am able to act in this matter under the competence standards set out in my firms legal aid contract; and my organisation is currently trading and no Law Society intervention or other sanction prohibits me from acting in this matter.

4 Proof of means has been obtained.

(A Solicitor or a Fellow of the Institute of Legal Executives)

Date: __/___

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Signed: _

Evidence Checklist

- 4 Please tick the relevant box(es) to indicate evidence collected.
- 4 Please refer to the detailed financial eligibility guidance for controlled work.

Income		
Employed (P.A.Y.E.) Income:	State benefits (including passporting benefits):	
☐ Wage slips	☐ Bank statements	
Self Employed Income:	4 Name and type of benefit e.g.	
Recent bank statements	Income-based Jobseekers Allowance must be specified on the statement or	
☐ Complete financial accounts	additional evidence will be required e.g.	
Self Assessment Tax Return	notification letter.	
☐ Cash book	Original notification letter (for passporting	
Benefits in Kind	benefit, please refer to the table providing	
P11D tax form (benefits in kind)	examples of acceptable and unacceptable evidence in volume 2 part E).	
	☐ Latest letter advising change in benefit	
Other Income:	amount	
☐ Private /Occupational Pension documents	Letter from paying agency i.e. Department	
LI Evidence of rental income (bank statement or tenancy agreement)	for Work and Pensions, Jobcentre Plus,	
☐ Trust income (bank statement or letter	Pension Service confirming receipt of the	
from trustees)	passporting benefit at the date of application.	
Letter from friend/family providing support	4 Letters must specify name and type of	
student grant/loan letter	benefit. Letters over 6 months old must be	
Other:	supported by a recent bank statement. NASS Support:	
(e.g. bank statements)	Letter from NASS or Local Authority that	
4 For pensions and any other income that is	the individual is in receipt of support.	
subject to income tax, evidence must show the gross amount before tax is deducted.	4 Letter must be less than 6 months old.	
the gross amount before tax is deducted.	Tax Credits:	
	Tax Credit Award Notice (most recent).	
	☐ Other recent HMRC letter confirming	
	amount received. 4 Letter must be less than 6 months old.	
Expenditure (refer to guidance on risk-base		
Income Tax and National Insurance:	Child Care costs in excess of £600 per	
☐ Wage slips (employees P.A.Y.E.)	month	
☐ Tax calculation sheet form SA302 (self	☐ Copy of agreement/contract	
employed)	☐ Bank statement	
Housing costs (where amount exceeds	Maintenance (see guidance)	
one-third of client's gross income):	Receipts	
☐ Rent book/tenancy agreement	☐ Bank statement	
☐ Mortgage statement	Copy of Maintenance Order	
☐ Bank statement		
Capital (refer to guidance on risk-based evidence):		
☐ Bank statement	☐ Other:	
☐ Share certificate ————————————————————————————————————		
☐ National savings certificate/passbook		
☐ Premium Savings Bonds or Bond Record (summary)		

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