

Adults and Communities

Financial Declaration Residential and Nursing Care Services Form

About you			
Title	Name	Surname	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone number		National Insurance number	
<input type="text"/>		<input type="text"/>	
Address			
<input type="text"/>			
<input type="text"/>			
<input type="text"/>			
Email			
<input type="text"/>			

Opting to pay the full cost of your care

If you **do not** wish to complete this form or do not complete all sections correctly you will be assessed as having to pay for the full cost of services provided.

If you decide not to complete this form please tick here and sign the declaration below.

I do not wish to disclose my financial details and therefore agree to pay the full charge/contribution for the services arranged/provided by Barnet Council.

Signed:	<input type="text"/>	Date:	<input type="text"/>
---------	----------------------	-------	----------------------

For office use only	
SWIFT ID:	<input type="text"/>
Designated Officer:	<input type="text"/>
FDf 2017/18	

Please return completed form to:

Financial Assessment Team, Adults and Communities, London Borough of Barnet
Barnet House 1255 High Road, London N20 0EJ

tel: 020 8359 2238 fax: 0870 889 6828 email: financial.assessments@barnet.gov.uk

Please tick which type of funding you are seeking:

<input type="checkbox"/> Long term stay	<input type="checkbox"/> Review of care charge
<input type="checkbox"/> Property disregard scheme (12 weeks only)	<input type="checkbox"/> Temporary stay (where you intend to return home)
<input type="checkbox"/> Interim funding (e.g. pending completion of Deputyship)	

Please note: if you do not provide the details of your property, capital, savings and income requested on this form, we will not be able to process your application for assistance with funding from the council and you will be liable to pay the full cost for your care.

Introduction

This form must be completed if you are assessed to need residential or nursing care services which is either going to be funded by Barnet Council's Adults and Communities, or you are currently paying for your care privately but your capital has been depleted and you would like to request assistance with funding from the council.

From 1 April 2015, your financial assessment is worked out using the following legislation and guidance: The Care Act 2014; Care and Support (Charging and Assessment of Resources) Regulations 2014; and Care and Support Statutory Guidance 2014.

We will use this form to assess the amount you will need to pay towards the costs of your residential / nursing care.

You are required to complete the relevant sections as fully as possible. There are notes at the end of the form to assist you.

If you are completing this form on behalf of a relative or friend:

- if your relative or friend has mental capacity, he/she must sign or place his/her mark at the end of the form to indicate that the content of the form is complete and accurate
- if your relative or friend does not have mental capacity, you will need to indicate the legal capacity in which you act at the end of this form, for example, enduring power of attorney (page 3)
- if your relative or friend does not have full mental capacity and you do not have legal capacity to act on his/her behalf, please indicate at the end of this form that your relative or friend does not have mental capacity to complete the form and has not legally appointed a person to deal with his/her affairs.

If you would like assistance to complete this form, please contact the Financial Assessment Team on tel: 020 8359 2238.

If you are completing this form on behalf of a friend or relative, please see guidance notes attached.

Signature and declaration

Please read this declaration carefully before you sign and date it.

Privacy Statement

Barnet Council has a duty to protect the public funds it administers and may use the information you provide for the prevention and detection of crime. We may also share information with other council departments or external organisations in order to undertake our functions as a local authority. We will always comply with the requirements of the Data Protection Act 1998 and never give information about you to anyone else, or use information for another purpose unless the law allows us. If you want to know more about how your information is used, visit www.barnet.gov.uk/privacy

By signing this form you declare that you agree and understand the following:

- if I knowingly give information that is incorrect, incomplete or misrepresented my financial situation, I may be liable to criminal prosecution
- Barnet Adults and Communities will use the information I provide to process my financial assessment and I may be asked to provide further clarification or evidence of my income, expenses and capital assets
- if I do not fully complete this form or I do not provide information requested, I will be liable to contribute/pay the full charge for the services received
- I note that should any undeclared income or assets be discovered at a later date, the council has the right to reassess and backdate any charges and take action as necessary to recover the debt
- Barnet Adults and Communities may check some of the information with other sources within the council or other councils, Department for Works and Pensions etc
- I agree that Barnet Council may make enquiries it considers necessary in order to verify the accuracy of the information, and Barnet Council may give some information to other government organisations, if the law allows this
- if assessed as liable to contribute I must make regular and prompt payments to Barnet Council and / or my support provider for the service I receive
- I must let the council know straight away if my capital increases to more than the Upper Capital Limit (currently £23,250) and/or about any changes in my circumstances which might affect my financial assessment
- I authorise the Department of Works and Pensions/The Pensions Service/Jobcentre Plus to disclose details of my benefits to the London Borough of Barnet.

I certify that the information I give in this form is correct, complete and will reflect a true statement of my income, expenses and capital assets.

Signed:

Date:

Representative's declaration

If signed by a relative, agent or appointee, please state your full name and your relationship to the applicant/resident.

I declare that, to the best of my knowledge, the information contained in this form will be accurate and will represent a full and true statement of the income and savings of the resident named above.

Representative's name (block capitals)

Signed:

Date:

Data Protection Act 1998 – Information Agreement

Customer Financial Affairs has a duty to carry out financial assessments. To do this, we may need to share information we hold on our records with appropriate agencies or ask them for information so those working with you, can work together.

These could include council services such as Education and Social Care (Social Care refers to London Borough of Barnet). Also external services such as the Police, Health Services, voluntary organisations, other Local Authorities and other organisations providing a service to adults in receipt of social care.

You may change your mind at anytime with whom you wish to share your information. You will need to inform us of any change as we check, with whom you want your information to be shared with, before we release any information about you.

Name

Address

Telephone number

Signed:

Date:

Privacy Statement

Barnet Council has a duty to protect the public funds it administers and may use the information you have provided for the prevention and detection of crime. We may also share information with other council departments or external organisations in order to undertake our functions as a local authority. We will always comply with the requirements of the Data Protection Act 1998 and never give information about you to anyone else, or use information for another purpose unless the law allows us. If you want to know more about how your information is used visit www.barnet.gov.uk/privacy.

Part 1. Your residential or nursing home

1.1. Your residential or nursing home

What is the name and address of the setting where your care is/will be provided?

Name

Address

Is this a Nursing home Residential home

When did you move / will you move to this setting?

Date:

If you have been paying for your residential or nursing care yourself, please can you confirm how much you currently pay?

£ Per week Per month Not applicable

1.2. Financial affairs

Does someone else deal with your financial affairs? Yes No

If 'Yes' please tell us their details

Name

Address

Telephone number

Email address

What is this person's relationship to you?

Do you want all your correspondence from Barnet Council to be sent to this person?

Yes No

In what capacity do they act on your behalf?

Deputy appointed by the Court of Protection Appointee (benefits only)

Attorney by virtue of a Power of Attorney/Enduring Power of Attorney/Lasting Power of Attorney

Other (please state)

Part 2. Financial details

You **must** provide us with proof of all the information you declare in this section. We will accept photocopies of documents such as bank statements, benefit books, letter from the Department of Works and Pensions, private pension advice slips/letters, etc.

2.1. Income – income is money coming in on a regular basis

Please provide details of all of your income

Type of income	You £	How often?	Evidence sent Y/N?
State Retirement Pension	<input type="text"/>	<input type="text"/>	<input type="text"/>
Former Employments Pension (Please give name of company)	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
Income Support including Jobseekers Allowance	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employments Support Allowance	<input type="text"/>	<input type="text"/>	<input type="text"/>
Incapacity Benefit/Severe Disablement Allowance	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pension Credit	Savings credit <input type="text"/>	<input type="text"/>	<input type="text"/>
	Guarantee credit <input type="text"/>	<input type="text"/>	<input type="text"/>
Attendance Allowance/ Disability Living Allowance (care)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Disability Living Allowance (mobility)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal Independence Payment (daily living)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal Independence Payment (mobility)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Earned Income	<input type="text"/>	<input type="text"/>	<input type="text"/>
Carers Allowance	<input type="text"/>	<input type="text"/>	<input type="text"/>
War Pension/ War Widows /War Disablement Pension	<input type="text"/>	<input type="text"/>	<input type="text"/>
Restitution Pension from Germany or Austria	<input type="text"/>	<input type="text"/>	<input type="text"/>
Any other benefits (please specify)	<input type="text"/>		<input type="text"/>
Any other pensions or annuities (please specify)	<input type="text"/>		<input type="text"/>
Any other income (please specify)	<input type="text"/>		<input type="text"/>
Any other income (please specify)	<input type="text"/>		<input type="text"/>

2.2. Savings and investment accounts

Please list any savings and investments that you have. You must provide details of **all** the accounts in your name or joint names showing total amount. We need to see up to date proof of savings, capital or investment. Proof may be photocopies of your savings books, bank statements, advice slips, dividend slips, certificates etc. Please note we do not need the sort codes of accounts.

If we assess you as having savings or capital above the Upper Capital Limit (currently £23,250), you will be asked to pay the full cost of your care.

Type of capital	Account number	Value	Is it joint account?	Evidence sent Y/N?
Please provide proof showing details of the accounts over the last three months.				
Bank Current/Savings Account (s)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Building Society Account (s)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Post Office Account	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ISA/National Savings certificate	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Income/Capital Bond(s)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Stocks and Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Money held or invested abroad	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Capital held by the Court of Protection	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Properties/land – (other than your main home) address needed	<input type="text"/>			<input type="text"/>
Offshore Account(s) / Trust(s) (Please state the country)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Any other capital	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Any other savings	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

The following question must be answered

Have you given away, transferred or otherwise disposed of any capital assets in the last **five** years? (for example gave money to someone, transferred funds to a trust etc) Yes No

If 'Yes' please give the details (you may continue on a separate sheet if required)

Part 3. Housing and property details

3.1. Please say what type of accommodation you live in or did live in, if applicable – before you moved to residential/nursing care (this question must be answered)

<input type="checkbox"/> Rented privately	<input type="checkbox"/> With family / friends
<input type="checkbox"/> council / Housing Association	<input type="checkbox"/> Owned
<input type="checkbox"/> Other (please specify)	<input type="text"/>
If you are renting, is your rent paid by Housing Benefit?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

3.2. Ownership

Do you currently own your property? (if 'No' go to Question 3.6) Yes No

If 'Yes' please provide details.

Address	Postcode	Valuation (approximate)
<input type="text"/>	<input type="text"/>	<input type="text"/>

3.3. Ownership

Do you own any other property, building or land? Yes No

If 'Yes' please provide details.

Address	Postcode	Valuation (approximate)
<input type="text"/>	<input type="text"/>	<input type="text"/>

If 'Yes' do you receive any income from the property? (If 'Yes' please provide details) Yes No

3.4. Sole ownership

Are you the sole owner of this property? (if YES, go to Question 3.5) Yes No

If 'No' please say who the joint owner is.

3.5. Do you own the property as...

Joint Tenants	<input type="checkbox"/>	
Via Trust	<input type="checkbox"/>	
Tenants in Common	<input type="checkbox"/>	(if so, please say what you share) <input type="text"/>
Don't know	<input type="checkbox"/>	

3.6. Do you receive any income from the property?

If 'Yes' please give details of all income received and provide supporting evidence
e.g. copies of tenancy agreements etc.)

Yes No

3.7. Have you sold and/or transferred titles/ownership within the last 5 years?

(If 'Yes' please give details)

Yes No

Address	Date of sale	Sale price £
<input type="text"/>	<input type="text"/>	<input type="text"/>

3.8. Is there a mortgage or loan secured on your property?

If 'Yes' please provide the following details and provide documentary evidence such
as your last mortgage statement or a loan agreement

Yes No

Amount of mortgage / loan outstanding	£ <input type="text"/>
Amount of monthly repayment (if any)	£ <input type="text"/>
When is the loan / mortgage due for repayment?	£ <input type="text"/>

Part 4. People living with you

4.1. Do you have a partner that will stay / is staying at home?

(This includes husband and wife or civil partnership)

Yes No

If 'Yes' please tell us their details (If 'No' go to Question 4.3)

Title	Name	Surname	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you are receiving Former Employment (Occupational or Works) Pension, personal pension or retirement annuity contract payments, you can pay 50% of these pensions (not State Pension) to your spouse or partner. If you agree, these payments will then be disregarded when we work out your charge.

4.2. Please say if you agree to pay 50% of your Former Employment (Occupational or Works) Pension to your partner?

Yes No

4.3. Does anyone (apart from you) live in this property?

If 'Yes' please tell us their details below (If 'No' go to Question 4.5)

Yes No

Name	Relationship	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

4.4. Are any of the people named above (Question 4.3) in receipt of Disability Benefits or are unable to work because of a disability?

If 'Yes' please say who receives benefit/is disabled and the type of benefit s/he receives

Yes No

Name	Benefit type
<input type="text"/>	<input type="text"/>

Please read the notes section about the treatment of property carefully before answering this question. You do not need to complete this question if you qualify for an automatic disregard of your property.

4.5. Are there special reasons why you think the council should ignore the value of your property when we work out your entitlement to funding or your contribution towards funded care?

If 'Yes' please say why (you may attach a separate sheet if needed)

Yes No

4.6. Have you made gifts worth more than £500 to relatives, friends etc in the last 5 years?

If 'Yes' please tell us the details, such as who, the amount and the dates Yes No

--

You may be asked to provide more details of any gifts and provide supporting evidence.

4.7. Have you given away, loaned, transferred or otherwise disposed any capital or assets, including any property within the last 5 years?

If 'Yes' please tell us the details, such as who, the value amount and the dates Yes No

--

4.8. Any other relevant information about your finances

--

Part 5. Notes

Note 1. Why have I been given this form?

This form needs to be completed in order to assess your contribution towards the costs of care received residential/nursing care setting. The amount you will be asked to contribute will depend on your financial circumstances.

Note 2. Completing the form

You can of course complete the form yourself or perhaps with the help of a friend or relative. Please fill in all sections of the form that apply to you as fully as possible. Please enclose proof of all current income and capital. We will need you to provide copies of documents, including:

- bank/building society accounts
- pension books or letter from the Department for Work and Pension
- proof of occupational or any other pension
- proof of savings bonds, annuities, savings plans, shares, etc.

You do not have to provide us with original documents, photocopies are acceptable. You should not place valuable original documents, such as pension books, in the post. Barnet Council cannot accept responsibility for any documents lost in the post. If you are claiming disability related expenses, we will also need to see proof of receipts and invoices for your outgoings.

Note 3. How can you get help with completing this form?

If you need further assistance completing the form, please ask the person who gave the form to you to help, or contact the Financial Assessment Team on 020 8359 2238 or by email financial.assessments@barnet.gov.uk

Note 4. Who should sign this form?

You should sign the form unless someone has legal authority to act on your behalf e.g. appointee, power of attorney, a deputy, etc.

Note 5. What if I am unsure about the benefits I receive?

Just write what you know on the form, we will contact you about this.

Note 6. What if I have applied for benefits and have not received a decision yet?

Please indicate this on the form. Do not delay sending the form back if you are waiting for a decision. Please let us know if you are awarded benefits.

Note 7. Private Pensions

If you are in a care home, you can choose to give half of your occupational personal pension to your husband or wife. If you do this it will be ignored when calculating your charge but may affect the benefits your partner/spouse receives.

Note 8. Pension Credits

If you are aged 60 or over you may be entitled to Guarantee Credit. This guarantees a minimum income by topping up your weekly income to a set rate.

Savings Credit is for those aged 65 or over. You may get Savings Credit on its own or with Guarantee Credit.

You can enquire whether you are entitled to or to apply for Pension Credit, by contacting the Pension Service on 0800 99 1234 or text phone on 0800 169 0133.

Note 9. What if I do not know what my shares are worth?

You will need to provide the details of your holdings such as share certificates or number of shares you hold and the name of the company.

We will calculate for you the current value of your shares and national savings certificates.

Note 10. What if some accounts are in joint names?

Please state whether the accounts/savings are in joint or personal names. We need total amounts and details of who the account is jointly held with.

Note 11. What type of funding do you need?

Please say which type of funding you are applying for. The notes below should help you decide which box to tick, but if you are not sure please discuss this with the person who is arranging the care.

Long term stay

Please tick this box if your intention is to move on a permanent basis to Residential or Nursing Care (and the Property Disregard or Interim Funding arrangements do not apply to you).

Temporary stay

Please tick this box if your intention is to stay temporarily in Residential or Nursing Care and you intend to return home, for example your usual home is being adapted for your needs.

Review of care charge

Please tick this box if your care is already funded by Barnet Council, and you are reporting change in circumstances, or if we have sent you the form to ask for an update of your details.

Property disregard scheme

Please tick this box if you own your property which will need to be taken into account when your total assets are worked out. Normally, the value of the property will be disregarded for a period of 12 weeks and you will be expected to pay the full cost of care after this period. Please read the notes for more details and if you are not sure please discuss this with the person who is arranging the care.

Interim funding

Please tick this box if you have sufficient assets to pay for your care in long term, but are temporarily unable to manage them at the present. E.g. you are waiting for a Deputy to be appointed by the Court of

Protection. In this case the Borough may be able to fund your care in the interim period, but will expect full reimbursement once formalities are completed. This option is not usually available to those waiting for a sale of property.

Note 12. Your Residential or Nursing Home

If you are already receiving care, or if you know where you will be moving to, please give the name, address of your residential/nursing home and (for the residents already receiving care) the cost of your care.

Note 13. Does someone else deal with your financial affairs?

Please give the details of the person that is helping you with your finances and you want us to write to them with information about your charges.

If you want us to write to another person, please say what their relationship is to you and whether they act for you under any legal power.

You will need to send documentary evidence of any legal power given to another person to act for you.

Note 14. Who pays for your care?

This will depend on a number of factors including the severity of your illness or disability and your financial situation. The health and social care staff who assess your needs will advise you, but here is a general guide.

Fully funded

Your fees would be met in full by the NHS or other Government sources, but in very limited circumstances.

NHS continuing care

In some circumstances, where you are assessed as requiring a very high level of nursing care with constant supervision. The NHS will organise and pay for your continuing care in a hospital, a hospice or a nursing home.

Care for war pensioners

Available to those who qualify for help from the Veteran's Agency with funding under the War Pensions Scheme.

Section 117 aftercare

Available following a compulsory stay in a hospital for mental health treatment.

Funded with financial support from the council

The council arranges a care home for you, and your stay will be part-funded by the council. You will be financially assessed to work out how much you can and must pay towards the cost of your care.

Self-funding with practical support from the council

The council arranges a care home for you, but you pay the council for the costs of the care home.

Entirely self-funding (and self-arranging)

You arrange your own care, and you have to pay all of your own costs.

Respite care

Some homes offer respite care which lets you have a temporary stay in a care home while the family or friends who usually look after you have a rest or go on holiday. This is also a chargeable service but the rules for calculating charges for respite care differ from the rules for permanent care charges. For information about charging for respite care, please contact the Financial Assessment Team at Barnet Council on tel: **020 8359 2238**.

If you are assessed as needing care home accommodation, Barnet Council will generally only contribute financially to the care home fees if you have less than £23,250 in capital (including savings). If you qualify for financial assistance from Barnet Council, there are clear rules about how much you have to pay, and how much the council will contribute. The way the council calculates charges for care homes is set by Government to ensure that everyone throughout England will have their charges for permanent residential care assessed in the same way.

If you need continuous nursing care, this is assessed by NHS Barnet, and they will fund a fixed sum towards your care-based upon a separate nursing care assessment. The council will help coordinate this NHS assessment.

Note 15. Getting help from the council

Barnet Council aims to promote peoples independence, and will only recommend a placement in a care home where there are no other support options available to enable someone to stay within their own home. If this is the case for you or your family member and your savings and capital are less than £23,250, you should qualify for financial assistance from Barnet Council. You will need to complete a form to help us work out how much you must pay and how much the council should contribute. We call this a Financial Assessment and we will ask you to provide details of your income and capital or savings.

If you do not qualify for assistance from the council, you can contact My Care My Home on **0800 731 8470** or visit www.mycaremyhome.co.uk for advice on options for funding your care.

Note 16. How is the Financial Assessment carried out?

Your social worker or care manager will give you a financial declaration form. If you do not receive a form, please contact the Financial Assessment Team at Barnet Council on **020 8359 2238** who will send one to you. You can also contact this team if you would like to arrange a visit to help you complete the form. They will also help you to claim any additional benefits you may be entitled to.

Your charges will start from the first date of your placement, so it is important that you complete the Financial Declaration form as soon as possible to prevent receiving a large initial invoice. You will need to provide bank and building society statements to confirm your savings and income, and payslips to confirm any occupational or private pensions.

The Financial Assessment Team will send you a letter confirming how much you will have to pay towards the cost of your care and it will include a breakdown of the charges you will have to pay. The council assesses the amount you have to pay every year in April. Please tell us if there is a change in your income or capital during the year so we can reassess your contribution.

Note 17. How much will you have to pay?

The amount you pay will depend on:

- your capital (including for example your savings, and the value of any share you have in your home)
- your income (including certain benefits that you receive).

Note 18. How are payments calculated?

If you have **more than £23,250** in capital, you will be expected to pay the cost in full.

If your **capital is between £14,250 and £23,250**, you will be charged based on the income you receive (minus some elements which you are allowed to keep).

In addition, you will have to pay a tariff income (a small weekly sum to reflect the amount of capital above £14,250 which you have). We will assume you have a tariff-income of £1 per week for every £250 of savings over £14,250, and you will have to pay this tariff income towards the cost of your care.

So, for example, if you have £15,250 in savings we assume an income of £4 per week which will be added to your other income when working out your charge.

If your capital is **£14,250 or less**, you will be charged based on the income you receive (minus some elements which you are allowed to keep), but you will not be charged a tariff income.

Note 19. Income that you can keep

If you have £23,250 or less in capital, you will always get to keep some element of your income for personal use. For example, this will include:

- a personal expenses allowance, designed to give you money to spend as you choose, for example on personal items, or on small gifts for relatives. This rate is set by Department of Health each year (e.g. for 2017/18 this rate is set at £24.90 per week), but in special circumstances, Barnet Council may allow you more
- certain amounts from some of the benefits you receive
- certain amounts from some pensions you receive.

The health and social care staff who assess your needs will advise you, but here is a general guide:

It is important that you provide as much detail as possible to the council about the source of all the money which you receive, and keep us updated about any changes to your different kinds of income, so we can calculate exactly how much you are entitled to keep, otherwise you may lose out. Please contact the Financial Assessment Team on 020 8359 2238 for further details.

Note 20. What if your savings or capital are jointly-owned?

If you are a joint beneficial owner of assets, such as if you have a joint savings account, or you jointly own your home (whether or not you are registered as the legal owner), we will only take your share into account when calculating your capital level.

Sometimes, we may ask for details of the finances of your friends and relatives in order to find out more about your financial circumstances. For example, if you say that your home is jointly-owned, but it is

registered in your name, you may have to provide evidence of the proportion of a relative's claimed share in the ownership of the home.

Note 21. Will your home (or your share in it) always be taken into account when assessing contributions?

There are a range of situations where the value of your own home will not be taken into account when assessing how much you must contribute to the costs of your care.

If your stay in a residential home is a temporary one, then the value of your home is ignored as long as you:

- intend to return home, and your home is still available to you
- are taking reasonable steps to sell your home to allow you to move into a more suitable place on your return.

If your stay is permanent, the value of your home is ignored for the first 12 weeks. After that time, the value of your home is taken into account, unless it is still occupied by:

- your partner or spouse (including a civil partner)
- a child under 18 years of age who is dependent on you A relative or family member who is over 60 years of age
- a relative or family member who is disabled - this could be a son or daughter with a physical or learning disability
- your estranged or divorced former partner or spouse (including a former civil partner), if they are a lone parent of a child under 18 years of age.

Barnet Council also has discretion to disregard the value of your house and review the decision later if a person other than those listed above lives in your property. The council may decide to exercise this discretion, for example:

- if when you lived at home, you had a carer and they gave up their home in order to live with you and care for you
- when you lived at home, you had an elderly companion and they gave up their home in order to live with you.

Note 22. If my home counts as capital, but I do not have enough income or other capital to pay the care home fees, what can I do?

The council suggests that you may want to consider putting your home on the market for sale, or renting out your home – but you must make sure you get enough money to cover the full cost of your placement. In some limited circumstances, you may be able to enter into a Deferred Payments Agreement with the council. Contact the Financial Assessment Team for more information.

Note 23. What happens if I give my money, assets or other capital away?

If you have given away money, assets or property in order to avoid paying care home charges, those sums may continue to be treated as your income or capital when assessing how much you can and must pay. The council may take action against the recipient(s) of the assets you have given away or ask them to pay some of your costs.

Note 24. When your capital is falling

Paying or contributing to your care home charges is likely to reduce the amount of capital (including savings) you have. If your capital is falling, you should always keep Barnet Council informed when it is about to reach £23,250, and regularly thereafter, so we can take this into account when re-assessing the amount you have to pay for your care home charges.

For more information about how we work out charges, please contact the Financial Assessment Team at Barnet Council on 020 8359 2238. For independent financial advice, contact My Care My Home on 0800 731 8470. Visit their website at www.mycaremyhome.co.uk for more information.

Note 25. Choosing a care home if the council is helping to pay the fees

To offer you a real choice, Barnet Council and NHS Barnet have standard contracts with a range of independent and voluntary sector homes including homes that meet both cultural and religious needs.

However, you do not have to move to one of these homes, for example, if you wish to move to a home in a different part of the country to be near to relatives. If the council is contributing towards the cost of your care home fees, you can usually still stay in the home of your choice, provided that:

- the home where you are or will be a resident is registered with the Care Quality Commission
- the home is suitable for your assessed needs, and is prepared to enter into a contract with the council
- the care home does not charge more than Barnet Council would usually expect to pay for residential accommodation which is suitable to your assessed needs.

Note 26. What happens if the home I have chosen costs more than what the council would pay?

If the care home charges more than Barnet Council would usually expect to pay, Barnet will only contribute to the cost of your care at that particular home if there is no other available home which is suitable for your assessed needs, or if a third-party sponsor (such as a relative or voluntary organisation) reaches an agreement with the council to contribute towards the cost of the care home as well. We will ask for financial information from the person applying to enter into the agreement with the council. Failure to keep up with top-up payments may result in you being asked to move to a suitable alternative home available at a cost the council would usually expect to pay.

Note 27. What happens next?

We will endeavour to complete your financial assessment within 5 working days after we have received your completed Financial Declaration Form and other supporting documents. We will notify you the outcome in writing in due course.

Please do not hesitate to contact us if you have any queries on this matter. If you disagree with the financial assessment then you can contact the Financial Assessment team to request a review of the decision.

We also have a separate complaints procedure if you are dissatisfied with the service you receive. Please contact the Complaints and Information Manager for Adult and Communities.

If you wish to receive an acknowledgement of receipt of this form, please write the address of where to send the acknowledgment to.

Please send me the acknowledgement that you have received my Financial Assessment Declaration to the address on next page.

Further information is available on our website www.barnet.gov.uk

For office use only		
	Y	Date
Acknowledgement sent:	<input type="checkbox"/>	<input type="text"/>
Officer:	<input type="text"/>	
Swift ID:	<input type="text"/>	

Please write your address on this box.

Thank you for returning Financial Declaration Form.

- Your form is duly completed and I have received all required documentary evidence which enables me to calculate the amount you need to contribute towards your cost of care. We will endeavour to complete your financial assessment within next 5 working days and we will notify you in writing about the outcome.
- Your form is incomplete and I will need additional information (list attached) before we can calculate the amount you need to contribute towards your cost of care.

List of additional information needed in order for us to calculate your contribution:

This form is also available in large print, Braille,
or in an alternative language.

To request your preferred format, please contact the
Communication Lead for Adults and Communities on
tel: 020 8359 7150 or email: comms.adults@barnet.gov.uk

If you have any questions about this form,
please contact the Financial Assessment Team:
tel: 020 8359 2238 email: financial.assessments@barnet.gov.uk