# Buckinghamshire Council Brokerage Self-Funder Referral Form

# (Please note there is a £300 administration fee to use this service)

# We want to support people in the best way to give them the right support at the right time. To enable us to do this please complete all sections of the form and email to: [supportbrokerageservices@buckinghamshire.gov.uk](mailto:supportbrokerageservices@buckinghamshire.gov.uk)

**For any enquiries please call Brokerage Support Services - 01296 382667**

1. **Client details**

|  |  |  |  |
| --- | --- | --- | --- |
| Name: AIS: |  | Title: |  |
| First name: |  | Surname: |  |
| Preferred name: |  | Date of birth: |  |
| Preferred language: |  | Email: |  |
| Primary address: |  | | |
|  | | Post code: |  |
| Primary contact no: |  | Mobile no: |  |

|  |  |
| --- | --- |
| Please tell us why you are seeking care? | |
| *Brief description of your needs* | |
| Do you require domiciliary care? I.e. to help with washing, toileting etc. | *(Delete as appropriate)*Yes/No |
| Do you require a Personal Assistant?i.e. to help you go out into the community, for shopping or because of isolation etc. | *(Delete as appropriate)*Yes/No |
| Do you require a nursing home placement / residential home? | *(Delete as appropriate)*Yes /No |
| Are you looking for a Carers Respite break? | *(Delete as appropriate)*Yes /No |

1. **Reason for referral:**

|  |
| --- |
| What tasks do you need support with? |
| *(Please detail support required and times/frequency of visits)* |

1. **Next of Kin Details**

|  |  |  |  |
| --- | --- | --- | --- |
| First name: |  | Surname: |  |
| Preferred language: |  | Email: |  |
| Primary address: |  | | |
|  | | Post code: |  |
| Primary contact no: |  | Mobile no: |  |

**Please arrange a care package as described above, I understand that I will be charged (£300 including VAT) for the service (except when this is a referral for Carers Respite).**

**Print Name:………………………………………………………………………. Date:……………………………**

**Signature:……………………………………………………………………….…………………………… ……………**

**If a person lacks mental capacity this form must be signed on their behalf i.e. by a nominated person/Lasting Power of Attorney or by their Trustees. (If this Agreement is being signed by a person appointed under a Lasting Power of Attorney, a certified copy of the Lasting Power of Attorney registered with the Court of Protection must also be enclosed with this Agreement and returned to the Council)**

**Nominated Persons Name** **:……………………………………………………………………….**

**Signature:……………………………………………………………………….…………………………………………**

**Date:……………………………………………………………………….…………………………………………**

**Where there are trustees in place all trustees will need to complete the following**

**Trustee 1 Name:……………………………………………………………………….**

**Signature:……………………………………………………………………….…………………………………………**

**Date:……………………………………………………………………….…………………………………………**

**Trustee 2 Name:……………………………………………………………………….**

**Signature:……………………………………………………………………….…………………………………………**

**Date:……………………………………………………………………….…………………………………………**

**Trustee 3 Name:……………………………………………………………………….**

**Signature:……………………………………………………………………….…………………………………………**

**Date:……………………………………………………………………….…………………………………………**

**Guidance Notes**

Buckinghamshire Council (BC) can source packages of care for self-funders through our Brokerage Support Service. The Council will allocate your referral to an independent broker who will arrange care and/ or support services on your behalf and to your requirements. The Broker will negotiate the costs of any care services, support or placements with providers to ensure you are getting a competitive price and they will source a suite of options to give you choice over your care and support. The Brokerage Support Service to self-funders also includes unregulated advice from an Independent financial advisor called a Care Navigator. The Care Navigator will look at your finances and advise you on benefits and grants that you might be eligible for as well as highlighting how long your money would last to pay for any potential care support or residential placement put in place.

## What is a self-funder?

Following a free care assessment everyone will be offered a light-touch financial assessment to work out how much they can afford to pay towards the cost of their care.  A self-funder is someone who has capital in excess of the £23,250 in assets (typically savings) excluding their home. In this circumstance, you will be classed as a self-funder and you will have to pay the full cost of your care until your assets are either below, or will shortly be below the £23,250 in which case you are advised to make contact with Buckinghamshire council to notify them of this and arrange for a new financial assessment.

Self-funders are entitled to a range of free services from the council including: an assessment of your care needs, a financial assessment, information and advice relating to adult social care, information about welfare benefits, and information about getting financial advice so that you can plan your finances.

## What is the self-funder administration charge?

As a self-funder you can purchase care and support services from whoever you wish and you can find extensive information about the options available to you on our Information Advice & Guidance website [www.careadvicebucks.org](http://www.careadvicebucks.org) . Alternatively, you can pay BC to use the Brokerage Support Service to identify the right services for you and arrange the support package on your behalf. There is a fixed charge of £300 including VAT for this service. The work will be carried out by an independent support broker who has extensive knowledge of the local care marketplace.

**(Clients with assets less than £23,250, excluding their home, will not have to pay the £300 fee).**

**The £300 fee will apply when BC arranges any of the following on behalf of a self-funder:**

* A domiciliary care package
* Residential or Nursing Placement
* Day-care, including centre based and community based services
* Personal Assistant

**The £300 fee is NOT payable in the following situations:**

* For setting up Respite because this is covered by our standard Respite charges.
* If BC has arranged your care package and it needs to be suspended shortly afterwards e.g. for a stay in hospital, there will be no charge for reactivating your care package. If the original care provider that Brokerage Support Services sourced is unable to reinstate your care package we will find a new company to provide your care and we will not charge for finding the new care provider.

***Please note: If you have an existing care package that was arranged by someone other than BC and you now wish BC to amend or arrange different care on your behalf we will treat this as a new care package and you will be charged a fee of £300***