

Appendix 2 – Deferred Payments Application Form V4 December 2023

Please complete all sections and tick yes or no as necessary.

Please be aware that if you are applying for a Deferred Payment Milton Keynes City Council will usually ONLY fund your care for the first 12 weeks after moving into the care home (Property Disregard Period) unless your application has been processed and agreed. If the application is NOT AGREED before week 13 after your move, you will need to fund your care costs yourself until your application has been processed and a decision made.

If you have any questions, please contact the Financial Assessment Team on Milton Keynes (01908) 253337 or Financialassessments@Milton-keynes.gov.uk

Section 1. Person applying for the Deferred Payments Scheme (“The Applicant”)	
Title (e.g. Mr, Mrs, Ms)	
First name (s)	
Last name	
Date of birth	
Current Address	
Care Home Address (if different)	
Date of moving into Care Home	
Email	
Telephone Number	

Section 2. Representative(s) details – if you are completing this form on behalf of the Applicant. N.B. Representatives MUST be aged 18 or over	
Title (e.g. Mr, Mrs, Ms)	
First name (s)	
Last name	
Address	
Email	
Telephone Number	
2.1 What is your relationship to the person named in section 1	

2.2 Do you have legal authority to act on behalf of the Applicant named in Section 1 <ul style="list-style-type: none"> If YES to 2.2 YOU MUST PROVIDE relevant documents such as: Power of Attorney /Deputy for property and affairs (Court of Protection Order) 	Yes/ No
2.3 Does anyone else have legal authority to act on behalf of the person named in Section 1 <ul style="list-style-type: none"> If YES – If YES to 2.3 YOU MUST PROVIDE relevant documents such as: Power of Attorney /Deputy for property and affairs (Court of Protection Order) 	Yes/ No

If you have a Solicitor acting for the applicant or the representative, please provide:

Name of solicitor	
Name of firm	
Address	
Email	
Telephone Number	

Section 3. Details / Ownership of the Property

3.1 Full address of the property:	Postcode
3.2 Are you intending to sell the property to pay for your care? <ul style="list-style-type: none"> If YES – please go to question 3.3 If NO – please go to question 3.4 	Yes / No
3.3 Is this application a “bridging loan” to pay for the cost of your care until the sale of your property has been completed? <ul style="list-style-type: none"> If YES – DO NOT PROCEED WITH THIS FORM YET - Contact the Financial Assessment Team to confirm if there is time to process the DPA before the sale. If NO – please go to question 3.4. 	Yes / No
3.4 Is the property registered at the Land Registry? <ul style="list-style-type: none"> If YES to 3.4 – YOU MUST PROVIDE up to date copies of Land Registry Office Copies/relevant deeds/leases mentioned in the office copies If NO to 3.4 – DO NOT PROCEED WITH THIS FORM YET registration must take place before an application is made. See www.landregistry.gov.uk or ask a solicitor 	Yes / No
3.5 Ownership of the Property - Is the property owned solely by the Applicant? <ul style="list-style-type: none"> If YES to 3.5 - please go to Section 4 If NO to 3.5 YOU MUST PROVIDE details/relevant documents for other owners. A Deferred Payment requires ALL parties to agree to have a charge put on the property. 	Yes / No
3.6 Do you have current buildings Insurance cover for the property? <ul style="list-style-type: none"> If YES to 3.6 – YOU MUST PROVIDE a receipt or other evidence that it is up to date If NO to 3.6 – DO NOT PROCEED WITH THIS FORM YET insurance must be in place before an application is made. 	Yes / No

Section 4. Occupation of the Property	
4.1 Is there anyone in occupation of (living in) the property? <ul style="list-style-type: none"> • If YES – please go to question 4.2 • If NO – please go to Section 5. Property Tenure 	Yes / No
4.2 Is there a Short Hold Tenancy Agreement in place <ul style="list-style-type: none"> • If YES - YOU MUST PROVIDE a copy of the tenancy agreement • If NO – DO NOT PROCEED WITH THIS FORM YET. Contact the Financial Assessment Team to confirm if the DPA can proceed. The Council requires that this is in place before a Deferred Payment can be agreed. 	Yes / No

Section 5. Property Tenure	
5.1 What type of property is it? _____ For example, Detached/Semi-detached/Flat	
5.2: Is the property Freehold? <ul style="list-style-type: none"> • If YES – please go to question 5.8 • If NO – please go to question 5.3 	Yes / No
5.3 Is the property leasehold? <ul style="list-style-type: none"> • If YES – YOU MUST PROVIDE a copy of the LEASE. Please go to question 5.4 • If NO – please check your answer to question 5.2 	Yes / No
5.4 Is there a rent payable under the lease: <ul style="list-style-type: none"> • If YES – YOU MUST PROVIDE a receipt or other evidence that it is up to date and there are no arrears. Please go to question 5.5 • If NO – please go to question 5.5 	Yes / No
5.5 Is there a service charge payable under the lease: <ul style="list-style-type: none"> • If YES – YOU MUST PROVIDE a receipt or other evidence that it is up to date and there are no arrears. Please go to question 5.6 • If NO – please go to question 5.6 	Yes / No
5.6 Are there any other payments due under the lease (e.g. insurance premium?) <ul style="list-style-type: none"> • If YES – YOU MUST PROVIDE a receipt or other evidence that it is up to date and there are no arrears. Please go to question 5.7 • If NO – please go to question 5.7 	Yes / No
5.7 Is the Lessors/freeholder's consent required to the Deferred Payment Agreement charge? <ul style="list-style-type: none"> • If YES – Please provide written consent from them to verify that they agree to the Deferred Payment. • If NO – please go to question 5.8 	Yes / No
5.8 Is there a mortgage or secured loan on the property? <ul style="list-style-type: none"> • If YES - DO NOT PROCEED WITH THIS FORM YET. Contact the Financial Assessment Team to confirm if the Deferred Payment Application can proceed. The Council will not agree a Deferred Payment unless it can secure a first legal charge as security • If NO – please go to question 5.9 	Yes / No
5.9 Is the property held in trust? <ul style="list-style-type: none"> • If YES, please forward a copy of the trust document. Please go to question 5.10 • If NO Please go to question 5.10 	Yes / No

5.10 Please provide a written current Estate Agents valuation of the property.	
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Section 6. Disposable Income Allowance (DIA)

6.1 You can choose to keep an additional weekly allowance from your disposable income to assist with the maintenance costs of the property that you own whilst you are in the care home. Currently this is up to £144 / week. Do you wish to do this? <ul style="list-style-type: none"> If YES, please go to question 6.2 If NO Please go to section 7 	Yes / No
6.2 How much (up to £144) do you wish to keep?	

Section 7. Any other information/ details you can provide:

Section 8. Checklist of Documents THESE MUST BE SUBMITTED WITH THE APPLICATION	Ref	(tick/ n.a)
Power of Attorney / Enduring or Lasting Power of Attorney/Deputy for property and affairs (Court of Protection Order) – <i>MUST be original document OR Certified copy, originals sent to us will be returned to you securely.</i>	2.2. / 2.3	
Land Registry Office Copies/relevant deeds/leases	3.4	
Evidence /Trust deed or written documentation to show the proportion of the relevant property owned by the Applicant	3.5	
Copy of the tenancy agreement	4.2	
Copy of the lease	5.3	
Receipt or evidence that rent is up to date and there are no arrears.	5.4	
Receipt or evidence that service charge is up to date/ no arrears.	5.5	
Receipt or evidence that payments are up to date/ no arrears.	5.6	
Lessors/freeholder’s consent	5.7	
Copy of the trust document	5.9	
Copy of current professional valuation	5.10	

Section 9. Declaration and signature

- I have received the Council’s information leaflet on the Deferred Payment Scheme and wish to make an application to defer the costs of my care under this scheme.

- I understand that acceptance of any application under the scheme is at the discretion of Milton Keynes City Council subject to eligibility criteria and the Council being able to obtain adequate security (usually a first charge). The deferred payments will not take effect until a formal agreement is entered into.

- I confirm that:

- I own/ part own the property specified in this form. I authorise Milton Keynes City Council to check legal title to the property.
- When the agreement begins, I agree to a legal charge being placed on the property specified in this form and agree to pay the legal and administration costs incurred by Milton Keynes City Council in processing this application and completing the DPA and charge.
- I agree that I shall be responsible for payment of the weekly contribution to the cost of my care that I am assessed to make under the regulations specified in the Care Act 2014 regulations regarding charging from my income and other capital.
- I and all other persons who occupy or have an interest in the property specified in this form have been informed of the need to take independent legal and financial advice before I enter into an agreement under the Deferred Payments Scheme. Anyone with a legal interest in the property may need to be joined in the Deferred Payment Agreement.
- The information given on this form is true and accurate to the best of my knowledge.
- I have read and understood this application for the Deferred Payments Scheme and the terms of this declaration and understand that on receipt of this application form, Milton Keynes City Council may need to raise further enquiries with me to progress the application.

Full name & Signature	Date
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If you are signing on behalf of the person applying to use the Deferred Payments Scheme, you must be the person named in Section 2, and have legal authority to act.

Please return the completed form with required documents to:

Financial Assessment Team, Civic Offices ,1 Saxon Gate East, Central Milton Keynes
MK9 3EJ or email to Financialassessments@Milton-keynes.gov.uk

Adult Social Care Data Privacy Notice - We collect and use information about you so that we can provide you with social care services under the Care Act 2014 and related legislation. Full details about how we use this data and the rights you have around this can be found at www.Milton-Keynes.gov.uk/privacy. If you have any data protection queries, please contact the Data Protection Officer at data.protection@Milton-Keynes.gov.uk

