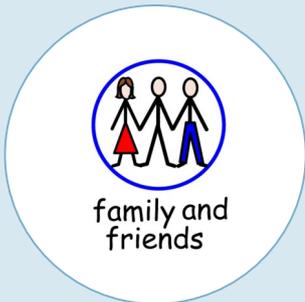


Family carers managing money series

Appointeeship



An appointee is a person or an organisation that manages someone's Department for Work and Pensions (DWP) benefits on their behalf. This is for people who do not have capacity to manage their own benefits.



Who can be an appointee?

- It could be an individual that knows the person, such as a family member, friend or advocate.
- It could also be an organisation such as a charity or company – they would be called a corporate appointee.



How do you get an appointee?

- The person or organisation that wishes to become the appointee must apply to the Department for Work and Pensions (DWP).
- The DWP may send a visiting officer to assess whether the person has capacity to manage their own benefits.
- The DWP may send a visiting officer to assess whether the proposed appointee is suitable.
- If someone may need an appointee, they could get a needs assessment from social care who may then refer them or they can arrange their own appointee.



What is an appointee responsible for?

- Claiming all DWP benefits
- Collecting all benefits, ideally into a separate bank account in the appointee's name.
- Reporting changes in circumstances like savings over £6,000. *The appointee may have to pay a civil penalty of £50 if they fail to report changes*
- Managing and spending benefits in the person's best interests.



What must an appointee report?

You must report changes in circumstances, such as:

- Savings levels – over £6,000 for people of working age and over £10,000 for people of retirement age.
- Address
- Income
- Marital status or other personal situation
- Mental capacity affecting their need for an appointee
- Illness or disability affected capability to work

Many other things can be classified as a change of circumstances. If you are not sure whether to report something, contact the DWP or a benefits adviser.



What are the limits of appointeeship?

You are only appointed by the DWP. This means that other organisations like utility companies, the Local Authority, or banks may not accept you as the person's representative. Some banks operate appointee accounts and most Local Authorities allow appointees to manage local benefits such as Housing Benefit, but you may need to register your status separately. Appointeeship does not allow someone to manage wages or pensions.



What is a corporate appointee?

- A corporate appointee is an organisation that acts as an appointee.
- This is good for people who need an appointee, but do not know someone that can do this for them.
- A corporate appointee could be a company, charity, solicitor or accountancy firm.
- Corporate appointees all have to provide the same basic service – applying for and collecting benefits.
- They may also offer extra services, like managing Local Authority benefits, supporting with other payments, or enabling the person to budget and spend their money.
- If you are looking for a corporate appointee, think about what support the person wants and ask questions to make sure you get the right service for them.
- For example:
 - How will they know how much money they have?
 - How will they get access to spending money?
 - How will you spend money in their best interests?
 - What happens if they want extra money, for example for a holiday?
 - How will you help them make bigger spending decisions?
 - Can you help the person to pay their bills?
 - How will you involve and share information with family members / the circle of support?
 - How will you keep the person's money safe?

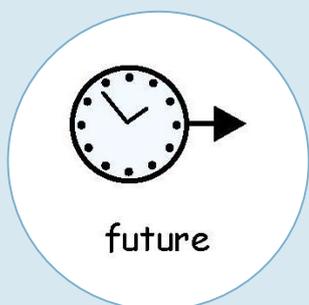


Remember, corporate appointees may not provide support in all these areas if it goes beyond the basic service of managing DWP benefits.



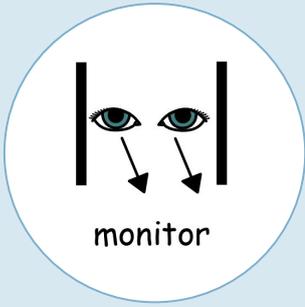
Why have an appointee?

- Appointees are for people who cannot manage their own benefits.
- It means someone else receives benefit letters and is allowed to speak to the DWP on the person's behalf.
- It means someone else can deal with problems or changes to benefits as soon as they arise (for example moving from DLA to PIP).
- It may reduce the risk of letters being missed and payments changing unexpectedly.



Planning for future changes

- If an individual currently acts as the appointee, think about what might happen in the future if the person can no longer act as the appointee.
 - If the benefit money is in the appointee's name, can someone else access the money if needed?
 - If the appointee becomes ill in the future and cannot act as the appointee, other family members or support workers need to report this to the DWP and arrange for a new appointee.
- Discuss with the individual, other family members, support staff and/or their social worker who might take over the appointeeship in the future. Have a look at organisations that can help so you have the information ready for when you need to make a change.
- Think about writing down what the person likes to do and spend their money on and discuss this with other people in the circle of support. Taking account of past wishes is part of a best interest decision, so it's good to write this down for the future.



How are appointees monitored?

- The DWP will usually do a basic review (by letter) of individual appointees every 8 years, or if they receive a report of a problem.
- There is no review of corporate appointees, unless a problem is reported.



What if an appointee is not doing their job properly?

- If you are not happy with what an appointee is doing you should first speak to them about your concerns.
- If they are not meeting their responsibilities as appointees (for example if they have not claimed all benefits, or are not paying the money on to the individual), you can contact the DWP to report this.
- If they are providing the basic service required of appointees, but you are not happy with the way this is done, it may be best to look for a different organisation or person that can do this, or speak to your Local Authority social care department to look at other options.
- If you are reporting or changing an appointee, check the process with the DWP and new appointee – there may be a break in the person's usual payments which you will need to plan for.



Where can I get more information?

- Read about appointeeship and how to apply at www.gov.uk/become-appointee-for-someone-claiming-benefits
- Report changes in circumstances by post or telephone using the contact details on your latest benefit letter or via www.gov.uk/contact-jobcentre-plus
- Calculate benefit entitlement at www.gov.uk/benefits-calculators
- Find contact details for your Local Authority for a needs assessment www.gov.uk/apply-needs-assessment-social-services
- Speak to a benefits adviser via your Local Authority or by contacting your local Citizens Advice Bureau at www.citizensadvice.org.uk
- Other options for managing someone's money including lasting power of attorney and deputyship www.gov.uk/browse/births-deaths-marriages/lasting-power-attorney

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