

Appendix 1

An example of form BF56

BF56 04/05

Office stamp

Application for appointment to act on behalf of someone else

Please use BLOCK CAPITALS throughout this application

Part 1 - About the person you want to act for

Their surname or family name

Mr/Mrs/Miss/Ms/Dr/Rev

Their other names - in full

All other surnames or family names they have been known by or are using now. Please include maiden name, all former married names and all changes of family name.

Their address

Postcode

Their National Insurance (NI) number

Their date of birth

No Do not fill out this form. Please contact us at the address shown above.

Are you applying to act for the person because they are incapable of managing their own affairs?

Yes Are you enclosing supporting evidence that the person you are applying to act for is incapable of managing their own affairs?

No

Yes

Are other family members or next of kin aware of your application to become the appointee?

No

Yes

The role and responsibilities of an appointee are set out in Part 8. You must read these so that you understand the roles and responsibilities before signing this document.

Are you applying on behalf of an organisation?

No Go to Part 2.

For example, a local authority or a firm of solicitors.

Yes Go to Part 3.

Application for appointment to act on behalf of someone else continued

■ Part 2 - About you

Surname or family name

Other names - in full

All other surnames or family names you have been known by or are using now.

National Insurance (NI) number
It will help us if you can provide this number.

Date of birth / /

Address

 Postcode

Daytime phone number

What is this number?
Please tick. Home Work Mobile

Fax number - if you have one

Please provide details of your local Post Office®.

 Postcode

■ Part 3 - If you are representing an organisation

Your surname

Your other names - in full

Your position or job title

Full official name of the organisation

Full postal address of the organisation
 Postcode

Organisation's phone number

Organisation's fax number

Please provide details of your local Post Office®.

 Postcode

Application for appointment to act on behalf of someone else - continued

■ Part 4 - Making payments to you**Payment direct into an account****We normally pay your money direct into an account**

You can use a bank, building society or other account provider. Many banks and building societies will let you collect cash at the post office.

How we will pay you

We will tell you when the first payment will be made and how much it is for. Each payment, after the first one should be the same unless there is a change in your circumstances. We will tell you whenever there is going to be a change in the amount we pay into your account.

Finding out how much we have paid into the account

You can check your payments on the account statements. The statements may show your National Insurance (NI) number next to payments that are from us. If you think your payment is wrong, get in touch with the office that pays you straight away.

If we pay you too much money

We have the right to recover any money paid to you, which you are not entitled to. This may be because of the way the Direct Payment system works. For example, you may give us information, which means you are entitled to less money but we may not be able to change the amount we have already sent out. If this happens, we will contact you before we recover any money.

What to do now

- Tell us about the account you want to use on the next page. By giving us your account details you are agreeing to be paid by Direct Payment and understand the information above about being overpaid.
- If you intend to open an account, please give us your account details as soon as you have them.
- If you do not have an account, please contact us and we will give you more information.

Application for appointment to act on behalf of someone else - continued

■ Part 4 - Making payments to you - continued

About the account you want to use

Please tell us your account details below. It is very important you complete all boxes correctly including the building society roll or reference number if you have one. If you tell us the wrong account details your payment may be delayed or you may lose money. You can find the account details on your chequebook or bank statements. If you are not sure about the details, ask the bank, building society or other account provider.

You must keep the money, belonging to the person you want to act for, separate from your own money or anyone else's.

We suggest you use an account in your own name only, or in your name on behalf of the customer. This is known as an *appointee account*.

We cannot pay money into a joint account involving a third party or into someone else's account.

Please note

A corporate appointee can use a corporate account or an appointee account. the appointee account must be in the organisation's or appointee's name, on behalf of the customer.

Name of the account holder

Please write the name of the account holder exactly as it is shown on the chequebook or statement

Full name of bank, building society or other account provider

Sort Code

Please tell us all six numbers for example: 12-34-56.

<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>
----------------------	----------------------	---	----------------------	----------------------	---	----------------------	----------------------

Account number

Most account numbers are 8 numbers long. If your account number has fewer than 10 numbers, please fill in the numbers from the left.

<input type="text"/>									
----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

Building Society roll or reference number

If you are using a building society account you may need to tell us a roll or reference number

<input type="text"/>																			
----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

This may be made up of letters and numbers, and may be up to 18 characters long. If you are not sure if the account has a roll or reference number, ask the building society.

You may be getting other benefits and entitlements that are not paid direct into an account. To have them paid into the above account, please tick the box.

Application for appointment to act on behalf of someone else - continued

■ Part 5 - Declaration

I apply to the Secretary of State for Department for Work and Pensions, Board of HM Revenue & Customs or Secretary of State for Defence for appointment to exercise, on behalf of the person named in **Part 1**, any rights they may have under the Social Security Acts, Tax Credits Act or the Naval, Military and Air Forces Etc (Disablement and Death Service Pensions Order 2006).

To the best of my knowledge no other person or organisation has been legally appointed to administer the affairs of the person named in **Part 1**.

I declare that I have discussed my appointment with other family members or next of kin and that they do not object to my application. **This applies to corporate appointees as well.**

I understand that I must promptly tell the relevant office that pays the benefit, pension, allowance or credit anything that may affect the entitlement to, or amount of, that payment.

I declare that the information I have given on this form is correct and complete as far as I know and believe.

I understand that if I knowingly give information that is incorrect or incomplete, I may be liable to prosecution or other action.

I understand and agree that any information provided may be used by the Department for Work and Pensions, HM Revenue & Customs or the Services Personnel and Veterans Agency to administer this application.

I undertake to the best of my ability to give the Department or Board all the information required by them about the circumstances of the person named in **Part 1** and give information about any relevant changes in their circumstances which may affect the entitlement to, or amount of, the benefit or tax credit claimed.

I will receive any benefit, pension, allowance or credit to which the person named in Part 1 is entitled and spend it in their best interests and keep it safe for them in the interim.

I have read, understood and accept the conditions contained in **Part 8** of this form. The duties and responsibilities required of me when acting for the person named in **Part 1** have been clearly and fully explained to me.

This is my application to be appointed to act for the person named in Part 1.

If you are applying to be an individual appointee, please complete box A.

Persons applying on behalf of an organisation complete box B.

Box A

I am over 18 years of age

Signature (to be signed at interview)

Date of interview

 / /

Box B

I am authorised to make this declaration on behalf of the organisation named in Part 3

Signature (to be signed at interview)

Date of interview

 / /

Application for appointment to act on behalf of someone else - continued

Part 6 - How we collect and use information

The information we collect about you, and the person you are acting for, and how we use it depends mainly on the reason for your business with us. But we may use it for any of the Department's or Agency's purposes, which include

- social security benefits and allowances
- child support
- employment and training
- private pensions policy
- retirement planning, and
- war pensions.

We may get information from others to check the information you give to us and to improve our services. We may give information to other organisations as the law allows, for example to safeguard against crime.

To find out more about how we use information, visit our website www.dwp.gov.uk/privacy.asp or contact any of our offices.

Part 7 - For office use only

Supporting medical evidence necessary

No Yes

Name and address of suitably qualified professional for example, social worker or community psychiatric nurse

Postcode

Other family members / next of kin Discussed - no further action Discussed - further action required

Appointment

Please tick the box that applies

Authorised Refused Reason for refusal

<i>Continue on a separate sheet if necessary.</i>

Signature Date / /

Name in CAPITALS Job title / /

Now pass this form to the appropriate officer for processing or inputting details on the system if necessary

Have other interested sections or offices been notified of the outcome? N/A Yes

Is appointee a corporate organisation? N/A Yes

Corporate organisation's identifier (PDCS compliant benefits only)

Signature Date / /

Name in CAPITALS Office name / /

Forms issued BF57

Appointeeship cancelled Reason for cancellation BF 58 issued

Signature Date / /

All other offices or sections informed. CIS/CES/PDCS checked

Application for appointment to act on behalf of someone else - continued

■ Part 8 - Roles and responsibilities

For retention by the person named in Part 2 or the organisation named in Part 3

If it is accepted that you can act for the person named at **Part 1** you will become responsible for dealing with their social security affairs, HM Revenue & Customs tax credit affairs and war pensions affairs.

This includes claiming and receiving

- social security benefits
- social security pensions
- social security allowances
- HM Revenue & Customs tax credits
- war disablement or war widows or widowers pensions.

Any money that you receive on their behalf must be used in their and their dependant's best interest. **For example**

- paying their fees for a nursing or care home or carer
This includes the fees for social care services such as residence in a care home or support in their own home.
- towards meeting everyday living costs.

However, if they are in a nursing or care home, you must ensure that the specified amount of personal allowance is paid over each week for the benefit of the person named in **Part 1**.

You must tell the person's Department for Work and Pensions or HM Revenue & Customs office or the Service Personnel and Veterans Agency straight away if there is a change in the person's circumstances which could affect their benefit. A list of changes, which must be reported, is given in the notes issued with the first payment of benefit. If you do not have a copy of the list of changes you must report, you can get one from your social security or HM Revenue & Customs office or the Service Personnel and Veterans Agency.

Examples of changes you must tell us about are when the person

- changes address
- changes name
- has a child leaving school
- goes into or comes out of hospital, including coming out of hospital on leave
- becomes well enough to manage their own affairs
- intends to be absent from Great Britain for any period
- dies.

This list is not exhaustive.

If the person you named in **Part 1** dies, you must

- tell your Jobcentre Plus office, social security office, Pension Centre, HM Revenue & Customs office, or the Service Personnel and Veterans Agency straight away if their payments were being made direct into an account
- return any cheque payments you have for them.

As an appointee you will also be responsible for letting us know if there are any changes in **your**

- name
- address
- contact number
- account details.

Continued on next page ►

Application for appointment to act on behalf of someone else - continued

■ Part 8 - Roles and responsibilities - continued

If an overpayment happens

If an overpayment of benefit occurs, you may be required to repay the overpayment yourself depending on how the overpayment arose. See **Part 4**.

You will be responsible for repaying any overpayment of benefit that happened because you

- made an untrue or incorrect statement about yourself or the person named in **Part 1**
- failed to report a change in your own circumstances
- failed to report a change in the circumstance, which you knew about, in respect of the person named in **Part 1**
- failed to obtain relevant information about the circumstances of the person named in **Part 1**.

How long can I be an appointee?

You will be an appointee until

- the person you are an appointee for becomes well enough to manage their own affairs
- the person you are an appointee for dies, or
- you or the Department for Work and Pensions, HM Revenue & Customs or the Service Personnel and Veterans Agency decide to end the arrangement because it is not working properly
- you wish to end the arrangement because you no longer wish to continue as an appointee.

If you want to end the arrangement you must write to your Department for Work and Pensions, HM Revenue & Customs office or the Service Personnel and Veterans Agency, giving them at least one month's notice.

Additional information for organisations

All appointees are responsible for the collection and administration of the person's social security benefits, pensions and allowances, HM Revenue & Customs tax credits, and war pensions and allowances. If the organisation nominates a representative to carry out the appointee duties on their behalf, **the organisation** remains responsible for the management of the person's affairs. Organisations should therefore make any nominated representatives aware of their responsibilities to both the organisation and the person named at **Part 1** and will need to provide them with a letter confirming they are authorised to act on behalf of the organisation. This certificate can be found on form **BF57**.

If you are acting as a representative within an organisation, there are some aspects that need to be considered in addition to those already mentioned. When quoting the appointee details, it is the organisation details that must be given and not those of an individual.

You will need to contact us if any of the following details change

- the organisation name
- the organisation address, including postcode
- phone and fax number
- the organisation ceases to exist, for example, a nursing or care home closes
- bank account details.