



Professional deputy costs insert



How to complete this form

PLEASE WRITE IN CAPITAL LETTERS USING A BLACK PEN

Mark your choice with an X

If you make a mistake, fill in the box completely and then mark the correct choice with an X

If a question does not apply to you, leave it blank and go to the next question

Cymraeg: this form is also available in Welsh. Email customerservices@publicguardian.gov.uk



Guidance

Fill in this insert if you charge for your services. Send it to us with your completed deputy report form. This will help us to understand your costs.

You must also send a copy of this insert to the Senior Courts Costs Office (SCCO) when you submit your bill of costs for assessment at the **end of the next reporting period**. This will help them to understand whether your costs are reasonable and in proportion to the client's estate and the work done on the client's behalf.

In cases where fixed costs have not been applied, professional deputy costs may include:

- interim bills paid from the client's funds in this reporting period before SCCO assessment
- payments for the balance of costs due after SCCO assessment. These final cost payments may relate to costs from a previous reporting period, but we still need you to tell us about them in this insert

Professional deputy standards

As a professional deputy, you are expected to meet our standards, in particular the following:

- 3a (9) Maintain a clear and transparent fee levying policy that operates in the most cost-effective manner for the client
- 3a (10) Carry out regular billing of deputy's costs in line with the fixed costs practice direction

More information

Professional deputy standards

www.gov.uk/government/publications/office-of-the-public-guardian-deputy-standards

Professional deputy costs: a good practice guide

www.gov.uk/government/publications/professional-deputy-costs

Court of Protection (COP) Practice Direction PD19B: download it from

www.judiciary.gov.uk/publications/19b-fixed-costs-in-the-court-of-protection

Your privacy

We will treat any information you give us in line with the General Data Protection Regulation (GDPR) and the Data Protection Act 2018. This means we will not give it to anyone else unless we have a safeguarding concern or we have to apply to the Court of Protection, when it would be available to anyone involved in the court proceedings. Find out more: go to GOV.UK and search for "OPG privacy".



Professional deputy costs

Case details

Case number

Where to find this number

Every letter from us will have your case number: look for 'OPG reference'.

Client details

First names

Last name

Reporting period

Start date

Day

Month

Year

End date

Day

Month

Year

Your reporting period

Check the letter that came with this form: your reporting period is highlighted in bold.

Professional deputy costs

1. How did you charge for your services in this reporting period?

Fixed costs Assessed costs Both



Annual management costs

Helpline
0115 934 2819



2. Costs for earlier reporting periods

Tell us about money paid to you in this reporting period for work you carried out in a previous reporting period (including VAT).

For example, the final amount received after assessment by the Senior Courts Costs Office (SCCO) and taking into account the three interim bills already received.

From

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Day Month Year

To

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Day Month Year

Date payment received

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Day Month Year

Amount

£

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>
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If you have received costs from multiple earlier reporting periods, please use an additional sheet.

3. Costs for this reporting period

How much have you been paid in this reporting period for work carried out in this reporting period (including VAT)?

Amount £

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>
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If you have charged in line with interim billing under Practice Direction 19B, please tell us more.

Interim 1

Amount £

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>
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Date paid

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Day Month Year

Interim 2

Amount £

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>
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Date paid

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Day Month Year

Interim 3

Amount £

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<input type="text"/>	<input type="text"/>
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Date paid

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Day Month Year



4. Total costs received in this reporting period

What were the total costs received in this reporting period? (Including VAT)

Amount £ .

This should be the total of this reporting period and the earlier reporting period, and should match the information in your annual deputy report. If the costs do not match, please tell us why.

5. Likely costs this reporting period

What amount is being submitted to the SCCO for assessment for this reporting period? (Including VAT)

Amount

£ .

6. Estimated costs this reporting period

If you charged 20% or more above your estimate from your last reporting period, tell us why.





7. Other costs

Give us a breakdown of other professional deputy costs (including VAT) received in this reporting period

Appointment £ .

Annual report £ .

Other costs £ .

If you've entered an amount under other costs, tell us more.



Estimated costs in the next reporting period

Helpline
0115 934 2819



Tell us about the costs that you and other fee earners expect to charge the client during the next reporting period. You must submit this insert to the SCCO at the end of the next reporting period along with your bill of costs. This will help the SCCO understand whether the professional deputy costs charged to the client are reasonable and proportionate to the client's estate and the work done on their behalf.

OPG will review your estimate for the next reporting period looking at a number of factors, for example the estimate in relation to the size of the estate and previous costs in the case.

Next reporting period

Start date

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Day Month Year

End date

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Day Month Year

8. How will you be charging for your services in the next reporting period?

Fixed costs Assessed costs Both



Charging fixed costs? You do not need to fill in the rest of this section.
Go to the deputy's declaration.

9. Attendance and communications

Tell us what you and other fee earners expect to charge the client during the next reporting period for contacting them or any other people involved in their case.

Contact with the client, their family and friends £

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Contact with case managers and care providers £

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Contact with other parties £

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10. Work on forms and other documents

Tell us about the amounts you and other fee earners expect to charge for time spent working on any relevant documents on behalf of the client.

Work on forms and other documents £

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11. Total estimated costs for the next reporting period

Tell us the total amount you expect to charge the client for work carried out during the next reporting period.

Total estimated costs (excluding VAT) £

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If your bill of costs is 20% or more above the amount you've given here, you will need to give an explanation to the SCCO when you submit your bill to them at the end of the next reporting period.

Please note: the SCCO may still query the information you give in this insert in their assessment of your costs.

12. More information

If you have any information that will help explain your estimated costs for the next reporting period, tell us more.



Deputy's declaration

Helpline
0115 934 2819



I confirm that the information I have given in this report is true and correct to the best of my knowledge and belief. I understand I have obligations to the Court of Protection and the Office of the Public Guardian and that if I knowingly provide false or misleading information there may be legal consequences.

I am signing this report on behalf of myself and each of the deputies named in the court order (unless I have stated otherwise and provided reasons).

I confirm that I have had regard to the Mental Capacity Act 2005, its Code of Practice and the court order in this case. I understand the duties and obligations placed on me.

Deputy's signature

Date

Day

Month

Year

Check this box if you are not signing on behalf of all deputies

Tell us why.

Send to:

Office of the Public Guardian

PO Box 16185

Birmingham B2 2WH

