



STOCKPORT
METROPOLITAN BOROUGH COUNCIL

Charging Policy for Adult Social Care Non-Residential Services

April 2026



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1. Introduction and Legal Framework

This policy is a combination of statutory requirements and local choices based around the needs of the service in relation to charging for non-residential care. The policy applies for all service users using chargeable non-residential care services.

The Care Act 2014 provides a single legal framework for charging for care and support. When arranging care and support to meet needs Stockport Metropolitan Borough Council can charge, except where required to provide care and support free of charge. The policy intends to make charging fair and clearly understood. The overarching principle is that people should only be required to pay what they can afford. People will be entitled to financial support based on a means-test and some will be entitled to free care. There will also be some services where a flat rate is charged.

This Policy sets out the Council's intentions regarding which services to charge for or not. Where it has been decided to charge the regulations will be followed and due regard to the guidance will be taken.

Detail on charging is different depending on whether someone is receiving care in a care home or their own home or another setting. The approaches exist to reflect that the delivery model for care homes is relatively uniform across the country and it is sensible to have a single national model for charging purposes. For other models of care there is a greater variety of approaches and innovation which the Government wishes to continue.

Consequently, Stockport Metropolitan Borough Council has developed and will maintain this policy setting out how it will charge people in settings other than care homes.

The legal framework for Charging is set out within the Care Act 2014 within Sections 14, 17 and Annexes B and C.

Annex B of the Care Act 2014 sets out how capital should be treated and the treatment is the same whichever setting the care is being given.

Annex C of the Care Act 2014 sets out how income should be treated when conducting a financial assessment and is divided into Care Homes and all other settings.

The following objectives are implicit within the policy:

- Charges should be affordable to people
- Be comprehensive and equitable
- Be clear and transparent
- Promote wellbeing, social inclusion and support personalisation, independence, choice and control
- Support carers
- Be person focused
- Apply charging rules equally
- Encourage employment, education or training
- Be sustainable for local authorities

The appropriate assessment of needs has been carried out and Stockport Metropolitan Borough Council has chosen to charge

2. Services covered by this policy

The following non-residential social care services are chargeable services:

- Home Care and Personal Support (including night sitting service)
- Day Care
- Telecare (extended community alarm service)
- Self-Directed Support - including Personal Budgets and Direct Payments
- Housing Related Support Services including extra care housing
- Services provided by Pure Innovations

The charges for these services will be reviewed every 12 months, normally in April to coincide with the annual service user assessed charge re-assessments, but the Council reserves the right to review service charges at other times as and when appropriate.

3. Services not covered by this policy

- Advice and information about assessments and community care services.
- Assessments of social care needs and care planning.
- All residential care services including respite care, which are charged for separately under another policy.
- Protection of Property Services, which are charged for separately under another policy.

4. Services Exempt from Charging

- After care services under Section 117 of the Mental Health Act 1983
- Services provided to people who have Cruetzfeldt Jacob Disease (CJD)
- Community Equipment Services
- Aids and any Minor Adaptations costing less than £1000, including fitting
- Services provided as part of Intermediate Care, for up to the first 6 weeks
- Reablement services, for up to the first 6 weeks, or for a shorter period if the reablement service has enabled the service user to realise their potential to be as independent as possible and the reablement service is no longer required but there is still a need for ongoing care and support service.
- Any service or part of service which the NHS is under duty to provide. This includes Continuing Health Care and the NHS contribution to Registered Nursing Care.
- More broadly any services which a local authority is under duty to provide through other legislation which may not be charged for under the Care Act 2014 e.g. no recourse to public funds (Human Rights Act)

Charges will also not be made in relation to:

- Services provided to a person, and anyone who is caring for them, under the age of 18 years.
- Carers who receive a service in their own right to assist them with the care needs of another service user.

5. Supported Tenancy Care Services

All service users who are living in supported accommodation will be charged a standard charge per hour equivalent to the standard charge for home care, subject to their ability to contribute towards the cost of their care services.

6. Housing Related Support Services

Housing Related Support Services help people to live more independently and maintain their tenancies by providing housing-related support. Longer-term services, such as sheltered housing and other long-term support services are chargeable. Examples of long-term support services are sheltered housing, support worker services in hostels, or a warden or community alarm service.

Housing Related Support services are different to personal/home care support or self-directed support services including Direct Payments.

Anyone in receipt of Housing Related Support Services who is not in receipt of Income Support, Pension Guarantee Credit or Housing Benefit is liable to pay for their support service. They can ask for a financial assessment using this charging policy to see whether the financial assessment results in a lower charge and if it does then they pay the lower charge.

7. Self-Directed Support

Self-Directed Support means that following a social care assessment to find out about eligible needs, a Personal Budget can be given to spend to meet care needs and improve quality of life. A Personal Budget is made up of the amount it would cost to meet agreed support needs. This money can either be paid as a Direct Payment so that a service user can arrange their own care and support, or the council can arrange this for them.

8. Direct Payments

Where a Direct Payment is proposed the payment will be made up of the Direct Payment amount less the assessed contribution. To receive a Direct Payment a service user will have to open a Direct Payment bank account and pay their assessed contribution into this account on a regular basis.

9. Direct Payments & Respite Care

If the Direct Payment includes an element to enable purchase of respite care and this respite care is to be taken in the service users' own home and or a registered care home, then the contribution towards the respite care is included in the contribution that the service user is required to pay into the Direct Payment Account.

10. Administration Charge for Self-funders

If a service user is not eligible for council funding due to capital over the upper limit and fully pay for their own care, then administration charges will apply if the user chooses to commission their service through the council. Charges will apply for commissioning services and ongoing reviews.

If a service users capital drops below the upper limit, then the administration charges will no longer apply.

11. Basis of Charging

A financial assessment is available where the service user's capital is less than the upper limit as set by the Department of Health each year.

Where the service user's capital is above the upper limit, they will be charged at the maximum rate for services received.

Where the service user's capital is below the upper limit, the charge will be assessed using the information they provide on the Council's Financial Assessment Form, to determine whether they should pay at a lower rate.

Where the service user or their nominated representative declares on the Financial Assessment Form that they do not wish to divulge details of their finances, they will be charged at the maximum rate. If they later decide to complete a financial assessment form, then any assessed charge will apply from the Monday following the date that the completed financial form is received by the Council.

If the service user or their nominated representative fails to complete the Financial Assessment Form or the relevant declaration, then they will be charged at the maximum rate for services received. If they later complete the form, then any assessed charge will apply from the Monday following the date that the completed financial form is received by the Council.

In some circumstances the Council may use its discretion to backdate an assessed charge to the date that charges started, dependant on the merits of each individual case.

In some circumstances, the Council will complete a financial assessment using information obtained from the Department for Work and Pensions (see section 32) where that information indicates the service user has savings below the upper limit.

Where a service user receives income as one of a couple the starting presumption is that the cared for person has an equal share of the income, however the Council will also consider the implications of charging for the income and savings left available to their partner.

12. The Financial Assessment

The financial assessment will be completed in accordance with the Department of Health's Care and Support Statutory guidance.

The assessment calculates a weekly charge, which is the maximum amount that a service user will be asked to pay for any combination of assessed charge services.

The assessed charge services are: Home Care and Personal Support, Day Care, Telecare and Self-Directed Support, including Direct Payments and housing related support services.

The weekly assessed charge is then compared with the cost of the services received and/or 100% of the personal budget/direct payment and the service user will be charged whichever is the lower of the two figures.

Respite care services to be taken at specific residential establishments may be identified in the need's assessment of a personal budget. Where this applies then the value of the respite service will be identified in the personal budget and charged for under Charging for Residential Accommodation Policy rules. The charge towards the remaining budget will be assessed in accordance with the non-residential charging policy.

At the time of the assessment the person's capacity will be considered and appropriate action taken where necessary. (See Section 31).

In some circumstances a light touch assessment will be undertaken when the Council is satisfied that a person can afford and continue to afford any charges due.

13. Calculating the Charge

The assessed cost of care or the value of the Personal Budget is first calculated. This depends on the amount and type of support a person needs to meet their eligible needs. A person's weekly income is totalled according to what counts as income. All income that

can be ignored or disregarded is totalled and the individual's living costs is added to the total disregards. This sum is then taken away from the person's actual weekly income.

If the total disregards are higher than the weekly income, the person will not be asked to contribute towards their care. What is left becomes the affordable weekly amount that is available to put towards the cost of the services provided.

The Financial Assessment Officer has two figures:

The assessed cost of the service or value of the Personal Budget and the affordable weekly amount the service user is regarded as having available to the cost of the service.

The service user will be asked to pay the lower of these two amounts.

The affordable weekly amount that the service user is regarded as having available will be calculated as follows:

Assessable income + Capital Tariff = Total Chargeable Income

Total Chargeable Income – (minus) Allowances & Disregards = net chargeable income

100% of the net chargeable income is used as the weekly maximum assessed charge. (Some exceptions apply – see item 13)

14. Income Taken into Account

Only the income of the cared for person will be considered as part of the financial assessment, unless disregarded under the regulations. Disregarded income will be either partially or fully disregarded. In all cases employed and self-employed earnings are disregarded. Where a cared for person receives income as one of a couple the starting presumption is that the cared for person has an equal share of the income.

Other sources of income such as benefits, pensions and payments from other products (subject to disregards) are included in the financial assessment.

The Council will ensure that a person is left with a minimum level of income. The MIG minimum income guarantee is set each April by the Department of Health.

The purpose is to promote independence and social inclusion and to ensure that they have sufficient funds to meet basic needs. This must be after any housing costs and any disability related expenditure.

The weekly income which is taken into account in all financial assessments is net of tax and national insurance and includes:

- All DWP (social security) benefits, allowances and pensions.

- All private and occupational pensions.
- All 'tariff income'.

Some types of income are ignored or disregarded when calculating the charge. The guidance contains a full list of the monies that are disregarded. The list includes the following:

- Earnings
- Child Tax Credit
- Disability Living Allowance Mobility Component
- Personal Independence Payment Mobility Component
- War Disability Pension
- War Widows Pension
- Savings Credit element of Pension Credit
- Personal Injury compensation/trust, including those administered by a Court
- Armed Forces Independence Payments and Mobility Supplement
- Child Support Maintenance Payments and Child Benefit
- Working Tax Credit

The council has used its discretion to disregard the following income, which the guidance says may be taken into account.

- The difference between the higher rate and the lower or middle rates of Disability Living Allowance and Attendance Allowance and the enhanced and standard rate of Personal Independence Payment, Daily Living Component. This disregard does not apply where the service user receives night care service – see section 19.

15. Capital/Savings

Capital includes savings, current accounts, investments, property and land other than the person's own home (the value of a person's home, where they normally live, is always disregarded.)

The value of the asset (other than National Saving certificates) will be the current market or surrender value of the capital asset minus any outstanding debts secured on the asset and 10% of the asset if there are selling expenses.

Surrender value of any life insurance policy and payments in kind from charities are disregarded.

There are also a number of time disregards set out in the guidance which must be taken into account.

Capital held by the service user, who receives the service, is taken into account. If savings are held jointly, and the other person does not receive a service, the amount of capital taken into account is usually halved.

A person with capital below the upper threshold will receive a financial assessment. The charge made for the services they receive will depend on their assessed level of income. If someone has capital between the lower and upper thresholds, then a 'tariff income' calculation will be applied. This calculation will take into account the amount being paid for care and the savings held.

In assessing what a person can afford the upper and lower capital limits must be applied. For those between the upper and lower limit will make a contribution (tariff income) and any capital below will be disregarded. On savings of between the upper and lower capital thresholds, £1 per week tariff income is assumed when calculating the person's total income for every block of £250 (or part of) between the two thresholds.

If someone has savings above the upper threshold for capital, the full cost of the service will be charged.

People who decline to disclose their financial circumstances will also be charged for their services at the full rate.

16. Disability-Related Expenditure

The overall aim of Disability Related Expenditure (DRE) should be to allow for reasonable expenditure needed for independent living for the disabled person. Items where the user has little or no choice other than to incur the expenditure in order to maintain independence of life will normally be allowed.

A standard allowance will be included in the financial assessment for disability costs.

If the service user feels that their disability costs are higher than the standard allowance, they can ask for a full disability related expenses (DRE) assessment. A Financial Assessment Officer will request proofs and if required arrange to contact the service user regarding the DRE assessment.

If the DRE assessment results in a disability allowance higher than the standard amount, then the service user's assessed charge will be adjusted accordingly, an Additional Disability Related Expense will be included.

Examples of types of expenditure that this may include are given below:

- Costs of any privately arranged care services
- Special clothing or footwear
- Additional costs of bedding
- Additional heating costs
- Additional metered water costs
- Basic garden maintenance

- Basic cleaning and domestic help
- Purchase, maintenance and repair of disability-related equipment
- Other transport costs over and above the mobility component of Disability Living Allowance or Personal Independence Payment

The Council will require verification of any disability related expenditure which can be provided in many different forms of proof:

- Receipts
- Contracts
- Medical letters
- Bank transfers
- Amazon Orders or similar

The Social Care financial assessment officers will consult the service users care plan on Liquid Logic when considering what is necessary disability related expenditure.

A Biannual review of disability related expenses above the standard rate is undertaken to ensure the amount is still in use and meeting the needs of the individual.

17. Household Expenses

The following household expenses will be allowed when working out the charge:

- Mortgage (Proofs required)
- Loans secured against the property (Proofs required)
- Service Charge (Proofs required)
- Water rates (Usual to award our current fixed rate)
- Building Insurance (Usual to award our current fixed rate)
- Contents Insurance (Usual to award our current fixed rate)
- Rent, less any Housing Benefit received
- Council Tax, less any Council Tax Support received

Other expenses are expected to be met from disregarded income.

If you have no liability to pay household bills, we will allow £10.00 a week allowance as you may have costs you need to contribute towards. The allowance is not linked to any specific cost item but is a notional amount designed to ensure the resident still receives an expense in the financial assessment to reflect household costs.

18. Property

The value of a property occupied by the service user as their main or only home will be ignored in charge assessments for non-residential services. There are different rules for property in residential charging.

The value of any other property owned, or part owned by the service user will be regarded as capital for financial assessment purposes

19. Deprivation of Capital and Property

Deprivation of assets occurs where a person has intentionally deprived or decreased their overall assets (capital or income) in order to reduce their overall assets in order to reduce the amount they are charged towards their care.

Questions of deprivation will only be considered where the person ceases to possess assets that would have otherwise been taken into account for the purposes of the financial assessment or has turned the asset into one that is now disregarded.

Not all deprivations are deliberate however and the Council will consider the reasons relating to the deprivation in accordance with the Charging guidance.

20. Night Care Services

Night Care support at home usually means support provided at any time between 11pm and 7am. Where a service user is provided with night care service and they are in receipt of the following benefits:

- The higher rate of Disability Living Allowance Care Component
- The higher rate of Attendance Allowance
- The enhanced rate of Personal Independence Payment, Daily Living Component

Then the full amount of this benefit will be included as income in any charge assessment.

Services delivered outside these hours a disregard is made in the charge assessment for the difference between the higher rate and the lower or middle rates of Disability Living Allowance and Attendance Allowance and the enhanced and standard rate of Personal Independence Payment, Daily Living Component.

21. Minimum and Maximum Charges

A minimum assessed contribution of £1.00 per week will be necessary for charges to be payable.

The maximum charge will be the full cost of the services received.

22. Treatment of Couples

Where a service user receives income as one of a couple the starting presumption is that the cared for person has an equal share of the income.

Capital held by the service user, who receives the service, is taken into account. If savings are held jointly, and the other person does not receive a service, the amount of capital taken into account is usually halved.

However, the Council will also consider the implications of charging for the income and savings left available to their partner so where a service user is part of a couple then 2 financial assessments will be completed, based on both incomes, capital and living costs and on the service user's income, capital and living costs only. The charge will then be the lower of the two assessments. However, where the couple's income involves benefits awarded as a couple, then the assessment will be based on both partners income, capital and living costs and the charge will be 50% of the net chargeable income

If both members of the couple are receiving a service then they will both pay 50% of the net chargeable income. If only one member of the couple is receiving a service, then they alone will pay 50% of the net chargeable income.

23. Informing Service Users

If the service user does not wish to complete a financial assessment form or does not co-operate with the assessment process, then they will be charged at the maximum rate. Details of how this has been calculated and how it should be paid will be sent to the service user or their nominated representative

If a client chooses to complete a financial assessment form, we will assess the clients charge. Confirmation of the full financial assessment charge together with details of how this has been calculated and how it should be paid will be sent to the service user or their nominated representative

Where a service user lacks capacity the Council will follow the guidance which states that where possible it will work with someone has authority to deal with the service users finances, which it will require evidence of, such as Power of Attorney, a Deputy appointed by the Court of Protection or Appointee for Social Security Benefits or someone who has the legal right to access the persons bank accounts. If there is no such person then a Social Worker may carry out a decision specific capacity assessment to inform who the service user needs to involve in financial decision making. This may involve an appropriate person becoming a Power of Attorney or Deputy but will be dependent on the financial circumstances of the service user.

24. Charging for Service Delivery

The service user receiving outcome-based services (care planned around individual needs) will be charged in 15-minute blocks for the care they receive.

The service user will be charged for any planned care visit where less than 24 hours notice has been given to cancel, or where the care worker is unable to deliver the visit because care is declined at the door or at any point during the visit.

Notice periods are chargeable when a service user ends their care service, except in circumstances where the service user has died.

25. Charging for 2 Carers

Where home care service involves 2 carers, the service user will be charged for the full hours of both carers.

26. Collection of Charges

For services commissioned by the Council the charges will be invoiced for on a 4-weekly basis, in arrears, for services received.

The Council reserves the right to vary this schedule subject to circumstances such as late notification of service delivery from providers or other factors that may affect the ability to produce invoices every 4 weeks.

Service Users are encouraged to make contact if they have difficulty paying the charges. Arrangements to pay any arrears by instalments can be made.

However continued failure to make payment will result in action being taken to recover the debt in accordance with the Council's Corporate Recovery Code of Practice. Initially this would involve reminder letters, telephone calls and possibly home visits to the debtor.

For Direct Payments and Managed Accounts, the charge will be taken off the weekly payment amount and the service user will be paid net of the charge.

27. Methods of Payment

Details of how to pay any invoices issued by the Council will be included on the back of the invoice.

28. Annual Re-assessments

The Council will aim to re-assess all service user contributions each year in April, to take account of changes in benefits, private pensions and the cost of living. The Council may choose to complete the annual re-assessment later than April subject to other prevailing circumstances.

For most residents an April re-assessment will be completed automatically by the Social Care Charging Team in line with benefits changes. However, some residents or their representatives may be asked to provide updated information at other times, dependent on the types of income and capital involved in their assessment.

29. Change of Circumstances

If the resident's financial circumstances change then they should inform the Social Care Charging Team and a re-assessment may need to be completed as it could result in a change to the charge.

Any re-assessed charge will normally take place from the Monday following the date of change however the Council will use discretion in deciding whether to re-assess the charge later than that. Each of the above is dependent on the individual circumstances.

30. Benefit Checks & Welfare Rights

As part of the financial assessment a check will be made on whether the resident is entitled to certain additional benefits, such as Housing Benefit, Attendance Allowance/DLA/ PIP if they are not already in receipt of these. The resident will be notified that they may be entitled to claim additional benefit and given information on how to do so.

A financial re-assessment will be undertaken following the award of benefits to re-calculate the charges payable. Any revised charges due to the award of additional benefits will be applied from the Monday following the date of change; however, the Council will use discretion in deciding whether to backdate the re-assessed charge later than that. Each of the above is dependent on the individual circumstances.

31. Appeals

A three-stage appeals procedure exists for anyone who believes their charge would cause them unnecessary hardship or they have been assessed incorrectly. However, it would be necessary for a financial assessment to have been undertaken prior to such an appeal being considered.

Details of the appeals procedure are available in a separate information booklet please contact us for a copy. We do have information online

www.stockport.gov.uk/review-or-appeal-the-contribution-youve-been-asked-to-pay

32. Data Protection and Confidentiality

The Council will store the information it collects from service users electronically. It will store and use this information in line with the requirements of the UK General Data Protection Regulation/Data Protection Act 2018. To find out more about how we use your data, please visit our privacy notices found on the following link

www.stockport.gov.uk/privacy-notice

The Council must also protect public funds and so it may use or share the information provided to prevent and detect fraud. It may also share this information, for the same purpose, with other organisations that handle public funds.

In some circumstances The Council will obtain details of benefits in payment to service users from the Department of Work and Pensions (DWP) in order to undertake a financial assessment. The Welfare Reform Act 2012 allows for the DWP to share information with Councils for the purpose of social care charging and the Council will ask for this information to complete assessments in the best interest of the service user and to ensure the charge is as accurate as possible.

The information provided for a financial assessment may also be checked against that provided for any Housing Benefit or Council Tax Reduction or Support claim made to Stockport Council for the purpose of verifying information provided but also to enable the Council to check that the service user is receiving the correct benefits and to assist them with claiming extra benefits where appropriate.

The Council will only share information on individual charge assessments with the service user or their nominated representative, who has a legal capacity to deal with their finances or access to their bank accounts, such as Power of Attorney, Deputy or Appointee, and the Council will require evidence of that legal capacity before it shares information with a 3rd party or written consent from the Service user to do so.

33. Policy Review

This policy will be reviewed on an annual basis, or at other times subject to changes in circumstances or legislation, in conjunction with any other policies relating to fees and charges. Any significant changes or extension of the charging policy, other than to the annual fees and charges, would normally be submitted to the Council's Executive Group for approval and may also require a period of consultation dependent on the changes involved.

34. For Further Information

Write to:

Social Care Charging Team
Revenues & Benefits
Stockport Council
Town Hall
Stockport
SK1 3XE

Telephone: 0161 474 4781

E-mail: socialcare.charging@stockport.gov.uk

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Appendix: Version History

| Version Number | Summary Of Change | Approved By | Author | Date |
|----------------|--|---|---------------------------|-------------------------------|
| 1.0 | N/A | Adult Social Care Senior Management Team | Steve Taylor | 20 th June 2011 |
| 2.0 | Minor amendments to Sections 22 & 23 – Collection of Charges & Methods of Payment | Adult Social Care Senior Management Team | Steve Taylor | 19 th June 2012 |
| 3.0 | Disregard of Guaranteed Income Payments under the Armed Forces Compensation added. | Department of Health – Circular LAC (DH) (2012) 3 | Steve Taylor | 29 th October 2012 |
| 4.0 | Full review of document – general minor updates - additions to clarify Self Directed Support contributions. | Adult Social Care Senior Management Team | Steve Taylor | September 2013 |
| 5.0 | Full Review and update to comply with the Care & Support Statutory Guidance issued under the Care Act 2014 to be implemented from 01/04/15. | Council Executive | Steve Taylor & Mark Frier | March 2015 |
| 6.0 | Full review and update to comply with the Care & Support Statutory Guidance issued March 2016 and information on what household expenses are allowed when working out charges | Executive Member for Adult Social Care | Steve Taylor & Mark Frier | April 2016 |
| 7.0 | General update in line with updated charging guidance and changes to non-residential service charges implemented in 2018 | Adult Social Care Senior Management Team | Steve Taylor | February 2019 |
| 8.0 | Direct Payment Respite charges are now non chargeable (Section 9) MIG rates set by Doh (Section 13) Request proofs for a DRE (Section 15) Review of Informing Service Users (Section 22) Second carer charges (Section 24) Amended information regarding date charges amended from (Section 28 & 29) Appeals link (Section 30) | Adult Social Care Senior Management Team | Clare Taylor | February 2021 |

| | General Review (Section 31) | | | |
|-----|---|---|---------------|------------|
| 9.0 | <p>Added additional items we accept as proof for DRE's and Biannual review for DRE's (Section 15)</p> <p>Added sentence regarding household expense £10.00 (Section 16)</p> <p>Added how capital is treated in annual uplifts (Section 27)</p> <p>Updated privacy link (Section 31)</p> <p>Amended address (Section 33)</p> | Adult Social Care Senior Management Team | Clare Taylor | June 2022 |
| 10 | <p>General update in line with 2024 charging consultation.</p> <p>Section 10 added.</p> <p>References to max charge removed.</p> <p>Section 25 amended following removal of 50% second carer discount.</p> <p>Section 29 reworded.</p> | Adult Social Care Directorate Management Team | Thomas Farrar | April 2025 |
| 11 | <p>No policy changes, but clarification added to sections:</p> <p>Section 17 - re £10.00 expense.</p> <p>Section 24 – re notice periods and 15 min block.</p> <p>Section 30 - to match Section 29 re re-assessed charges.</p> | Adult Social Care Directorate Management Team | Thomas Farrar | April 2026 |