

About the Independent Living Fund

The ILF may make payments to disabled people to be used towards the cost of appointing personal assistants or using a care agency, to provide the personal care and domestic assistance they need to live at home. To get payments from the ILF, you need to meet certain conditions (see leaflet 1 for more information).

Summary

This leaflet tells you what records you must keep in order to continue to get payments from the ILF.

The ILF will ask to see all your records and we may have to stop paying you if you cannot show them.

It is up to you how you keep your records as long as you record the details that are outlined in this leaflet. You must keep your ILF records for at least the last 6 tax years.

There are organisations that can help and give advice about record keeping. Please see leaflet 20 for more details.

Other formats

We can provide this leaflet in different formats, please contact our User Liaison Managers for more details.

How to get in touch with us:

Telephone 0845 601 8815
or
0115 9450700



Textphone 0845 601 8816

Fax 0115 945 0944
0115 945 0945
0115 945 0946

Address PO Box 7525
Nottingham
NG2 4ZT



E-Mail funds@ifl.org.uk

Website www.ifl.org.uk



This leaflet is not legal advice, and although it does not deal with your specific situation, it does set out your general obligations to the ILF. Any figures or references to documents are correct at the time of issuing. The ILF reserves the right to update this leaflet from time to time.

BD11—Issue 2—October 2007

Leaflet 11

Keeping Records



This leaflet explains what records you must keep for the ILF to look at



**Independent
Living Funds**

Creating Choice for Disabled People



What records must you keep for the ILF?

If you employ a personal assistant (PA) or use a self-employed PA you must keep a record of -

- The name, address and National Insurance number of every person who works for you, even if they do not work for you regularly.
- The dates on which a PA works for you.
- How many hours every PA works for you each day.
- The dates of any sick leave or holiday your PA takes.
- A record of how much you pay them, how you pay them (for example by cash or cheque) and when you pay them.

If you use a care agency, you must keep—

- Copies of all invoices the agency sends you.
- A record of the hours the agency works for you each day.
- How much you pay them, how you pay them (for example, by cash or by cheque) and when you pay them.



How long should you keep records?

The ILF will need to see records for 2 full tax years. The tax year runs from 6 April each year to 5 April the following year.

If you employ your PA(s) privately (not through a care agency) you will need to keep records for the last 6 years for HMRC (formerly known as the Inland Revenue) — please talk to HMRC when you are arranging to pay tax for your PA(s).

Employer Helpline (HMRC)



0845 607 0143



www.hmrc.gov.uk

How should you keep the records?

It is up to you how you keep records. Some people like to write everything down in a notebook, and other people keep records on a computer.

We will send you some examples of how to keep records when we send you the offer letter detailing our offer. You can use the example forms if you want or you can create your own forms.



What records will the ILF ask to see?

The ILF will ask to see all of your records. We may not be able to pay you if you cannot show us your records.

Our assessor will also ask to see records every 2 years when they review your care package. If you cannot show us your records, we may not be able to continue to pay you and you may need to pay some money back.

Records of Payments

It is also useful if you keep a record of all the payments in and out of your bank account. You can record the date and amount of your ILF payments. You can then also record the dates and amounts of any payments you make to your PAs or care agency (or both) and tax and National Insurance you pay.

By keeping these records, you will be able to show the ILF how you have spent the money you get from us and you will be able to see if you are spending too little or too much. When you get your bank statement you will be able to see if your bank's records agree with your records. This will help you find any mistakes that you or your bank have made.