

Self Directed Support: Getting you started

Information Pack

Version 2.3 - May 2014

Important Information

The information in this pack is correct at the time of printing.

The pack is meant to act as a guide giving hints and tips to help you get started.

You must check your legal position for yourself.

We have given you websites and telephone numbers to make this easier. However, we do not recommend any of the companies or organisations in this pack – they are for information only. Before using any of them you must check them for yourself.

Please note:

All updates of this pack will be put directly onto the council's website at www.iwight.com/adults

No paper updates will be sent out. It is your responsibility to regularly check for updates and print them if you wish to.

If you do not have access to the internet, you can go to your local library, ask a friend or ask your key worker for a copy.

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About this pack

Throughout this pack we have used the term “you”. “You” refers to the person who has been given the personal budget. So, if you are a parent, carer, broker or agent, “you” is the person you are helping who is in receipt of the money.

The information in this pack is designed to help you with your self directed support, from whether or not you are eligible for a personal budget through to preparing your plan and getting it agreed. It also looks at how you manage your money, including hints and tips if you choose to employ someone, through to reviewing how things are going.

It does not include everything you need to think about, it is merely meant to help point you in the right direction, giving you links and contact details for other organisations that can provide much more detailed information and advice.

What words mean

Words	Meaning
Agent	A person who acts on behalf of somebody else.
Broker	A broker is independent from the council. They have the role of helping people plan and organise their support.
Circles of Support	All the people who help people with support needs to make choices and be as independent as possible.
Direct Payment Personal Budget (DPPB)	Personal budget money is paid directly to the individual so that they can directly purchase services themselves.
Eligibility Criteria	The basis on which councils decide whether or not to offer person social care funding or services. Councils have to follow the national Fair Access to Care Services guidance.
Fair Access to Care Services (FACS)	The eligibility criteria used by the Isle of Wight Council.
Independent Account Manager (personal budgets)	Someone paid to manage an individual's personal budget money on their behalf.
Key Worker	Has the role of assessing need and levels of risk to people with care needs.
Managed Account Personal Budget (MAPB)	A personal budget where the arrangement and purchase of services are implemented/completed on behalf of an individual by a key worker.
Outcomes	The difference that doing something makes.
Outcome Focused Review	Looks at the outcomes set out in a person's support plan to see what is working well and what needs improving.
Personal Assistant (PA)	Someone who is paid to support people with a range of tasks to help them live their lives and achieve their goals.
Personal Budget (PB)	Money from the council used to pay for an individual's social care services to meet their unmet eligible support needs.
Self Directed Support	A system that allows people to have choice and control over their support.
Shared Assessment	Questionnaire that helps identify support needs.
Support Planning	The process of planning what support is required to meet an individual's social care needs.

What is self directed support?

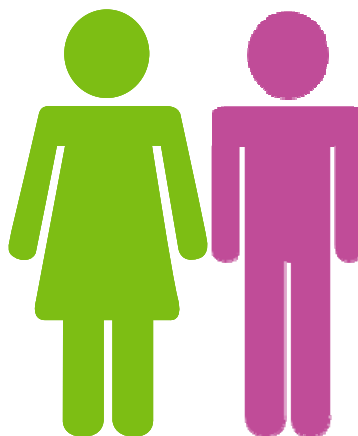
Whether you are eligible for funding from the council or you fund your own care, self directed support puts you in control, it means you choose the services and support you need instead of a key worker or someone else doing this for you. This enables you to make the choices and live the life you want.

To make self directed support a reality for those people who are eligible for social care funding from the Isle of Wight Council, we give people a personal budget.

What does this mean for me?

We think this means you'll be able to say:

- I have access to a range of support that helps me to live the life I want and remain a contributing member of my community.
- I feel valued for the contribution I make to my community.
- I have access to easy to understand information about health, wellbeing, care and support which is consistent, accessible and up to date.
- I am able to get skilled advice to plan my care and support.
- I can plan ahead and keep control at times of crisis.
- I have considerate support delivered by competent people.



Eligibility for adult social care services

To be able to receive a personal budget, you have to be eligible for support from the council for adult social care services. The council gives careful consideration to each request for care services, with all possible solutions being explored to support people to address their unmet needs before adult social care funding is considered, including providing a reablement service.

There is a national framework, set by the Department of Health, which councils use to decide who is eligible for services, called Fair Access to Care Services (FACS). FACS is the eligibility criteria – the council only has a duty to provide services to people who meet the FACS level it has set, which on the Isle of Wight is 'critical' and 'substantial'. You can find out more information about eligibility either from the Social Care Institute for Excellence's (SCIE) website at www.scie.org.uk (search for Fair Access to Care Services) or locally at www.iwight.com/adults.

Therefore, the first step to getting a personal budget is to discuss your situation with a key worker to see if any of your unmet needs are eligible.

Continuing Health Care

The government has said that local areas have to get better at deciding whether the National Health Service (NHS) or your council have responsibility for contributing towards the cost of your care and support. The National Framework for NHS Continuing Healthcare and NHS-funded Nursing Care describes the circumstances where the NHS should meet the costs of your care and support and the process to be applied to determine your eligibility.

The NHS and adult social care work together to determine if you are eligible for Continuing Health Care funding and will look particularly at what support you need in relation to your health condition.

If most of your needs are health related then you will be eligible for Continuing Health Care. If this is the case, then the NHS will fund the whole cost of meeting these assessed needs and is also responsible for providing the case management support.

Financial contribution

If you are found to have eligible needs, the council will carry out a financial assessment to work out how much you can afford to pay. Following the financial assessment, you will be told how much you will be asked to contribute to the cost of your care. Some people make no or only a small contribution whilst other people may have to pay for a larger part or for all of their care – the amount you pay depends upon your financial position and a council financial assessment officer will contact you to complete the financial assessment.

Maximising your resources

To help maximise your resources you may be entitled to money from elsewhere. The financial assessment officer will check that you are receiving all the money you are entitled to, or you can contact the appropriate organisations in section 11 of this pack who will be able to help you.

The assessment process

Once the council has ascertained that you meet eligibility, we then carry out an assessment which identifies the level of your support needs and whether these needs are already being met or not. This is done by asking a series of questions which look at all aspects of your life.

The assessment helps the council to make a fair and open decision about what support people require to meet their unmet eligible needs.

Who can help you with your assessment?

When the assessment takes place, other people you know well, like a family member or an unpaid carer, can be present to help make sure that your needs are recorded as accurately as possible.

What type of personal budget can I have?

You will be able to choose from the following types of personal budget:

- A **Direct Payment Personal Budget** is where your allocated amount of money is paid directly into your bank account and you then organise, buy and manage the services and goods agreed in your support plan.
- A **Managed Account Personal Budget** is where your allocated amount of money is used by your key worker to organise in-house or existing council commissioned services for you. The council then pays for the services through existing contracts.
- A **Split Personal Budget** is where part of your personal budget is a Managed Account Personal Budget and part of it is a Direct Payment Personal Budget. If you want to use services provided by the Isle of Wight Council, this will be paid for through the Managed Account Personal Budget element of your personal budget. You will then have the remaining amount of your personal budget as a Direct Payment Personal Budget which you use to organise, buy and manage the rest of your agreed care and support.



What should be included in your support plan?

The 'Support Plan' is the name of the plan which details how you will use your personal budget to meet your agreed outcomes. In order for your personal budget to be paid, your key worker has a responsibility to check that your plan considers all elements of your unmet eligible needs. They also have a responsibility to make sure that risks have been considered and the money is being spent in the right way.

There is more about risks in Section 6: Managing risk and safeguarding.

Support planning should be a good experience, so think about who should be involved, people like: family and friends; local community support (eg church, etc); independent broker or advocate; support workers; care managers or other people who know you well.

You should also think about where and when you would like to work on your plan. You might want to set a couple of hours aside or to break it up so that you think about one or two aspects of support at a time.

You need to think about all areas of your life, including things like learning new skills and how you will use your budget to make positive changes and to meet outcomes which support your personal development. You will need to think about:

- What is important to me?
- What do I want to change?
- How do I want to be supported and how will that support be managed?
- How will I stay in control of my life?
- How am I going to make this happen?

To help make sure your care and support runs as smoothly as possible, you will need to include a contingency plan. This will help you to think through what you would do if, for some reason, something goes wrong with your plan or something unexpected happens with your care and support. Hopefully, you will never have to use it!

Support plans can be as individual as the person themselves. The council wants to encourage people to be as creative as possible in developing their support plan. You can choose how you present your plan: it could be a written document, a colourful chart, a DVD, audio tape or something else. By being creative you may think of ideas and ways of meeting your unmet eligible needs that have not been considered before.

Many tools have been developed which can be used to help you to develop support plans. These can be found on the Internet by searching for 'support planning tools' or you can ask your key worker.

The council may not pay for some of the things mentioned on these websites: decisions about what people can and cannot spend their personal budget on are made around that particular individual, their needs and their outcomes – so what's agreed in one support plan may not be agreed in another.

Remember you can produce your support plan however you like as long as the money will be spent legally and the support and services have been costed.

How people have used their personal budget

We all need to budget for things we need and want in our life. This helps us prioritise. You will have to demonstrate in your plan how spending the money in your personal budget on particular items will meet your unmet eligible need and how this links to achieving positive outcomes.

Remember, you don't have to spend your entire budget, it is only a guide amount.

Here are some of the practical and creative ways people have spent their allocated money to meet their outcomes:

- The cost of helping to meet a variety of needs: eg support with personal care, cooking and cleaning, managing money, managing behaviours and risk, attending college, work/voluntary work opportunities, keeping safe and healthy, etc.
- Staffing cost for employers, eg, payroll, National Insurance, holiday leave, training, travel expenses, entrance fees, telephone cost, etc.
- Supported holidays (instead of more traditional respite care in a residential care home).
- Membership of clubs or societies.
- CD player to help someone keep calm in the back of the car (in place of additional staffing).
- Promoting skills and personal development in line with agreed outcomes.

To help you to find the support and services you want more easily, the council is working with local providers to develop a directory of services. When it is ready it will be put on the council's website and will be available directly or, if you don't have access to the Internet, through support organisations (see section 11).



Managing risk

Self Directed Support is a good way for people to have more choice and control in their lives. It helps people to think about what their needs are, know what money and support is available to them and make a plan for how to make it happen.

The council is keen to support people to do the things they want to do and to enable people to have real choice and control over their lives. This does, however, come with responsibilities, including thinking about risk factors and managing money received from the council.

When planning your support and living life day-to-day it is very important to be aware of risks:

- To yourself
- To other people
- From other people

The council believes that risks should not automatically limit your choice over what you want to do. However, if we think that a risk to yourself or others is too high, we will talk to you about this and work with you to try to find ways to make things safer.

Safeguarding

If you think that someone is taking advantage of you, not treating you with respect and consideration or is hurting you, then the Safeguarding Service is here to help you. They will offer advice and support and, where necessary, look in more detail at what's happening.

You can call the **Safeguarding Service on 01983 814980**, or if it's outside normal office hours, the **Emergency Duty Team on 01983 821105**.

REMEMBER

**Do not keep any worries to yourself –
speak to someone you trust**

Managing your personal budget money

There are several different ways of managing your personal budget money. Below is information about the different options available so you can choose the way that best suits you.

Please note: when opening a bank account to manage a Direct Payment Personal Budget, it must be a basic bank account with no credit facility and must be solely used for your personal budget.

Managing it yourself

This is where your Direct Payment Personal Budget money goes straight to you. You must have the capacity to understand your support plan and that your personal budget will be used to pay for this. You can get help to plan your support and manage your budget.

You will need to open a bank account after which you will receive money from the council which goes straight into that account.

You will be responsible for paying for your agreed support from this money and keeping accurate records to show the council what you spend your money on.

Agent

An agent is someone acting on your behalf and in your best interests. This can be a friend, family member or someone who knows you well (a 'Suitable Person'), or it could be an independent advocate.

Your Direct Payment Personal Budget money is given to your agent. Agents are an option when you do not have the capacity to understand your support plan and/or manage your money.

The agent opens a bank account in your name and receives money from the council which goes straight into that bank account. The agent is responsible for paying for your support from the money received and keeping records to show the council what you spend your money on.

Independent Account Manager (personal budgets)

This is where you pay an independent account manager to manage your Direct Payment Personal Budget money for you.

The account manager takes responsibility for managing the money, arranging payments to providers or staff and contributing to the review and monitoring process. You are still responsible for preparing your support plan and managing your support. There will be a charge for this service.

The account manager will have the responsibility for paying for your support from the money received and keeping records to show the council what you spend your money on.

Trust

Trusts are an option when you do not have the capacity to understand your support plan and/or manage your money, but still want to have a Direct Payment Personal Budget.

A Trust is a group of people who will act on your behalf ensuring that plans are in your best interests where you are unable to do this for yourself.

The Trust opens a bank account in the Trust's name and receives money from the council that goes straight into that bank account.

The Trust takes responsibility for paying for your support from the money received and keeping records to show the council what it spends your money on.

Trusts can be complicated to set up. For more information ask your key worker.

Key Worker

A key worker manages your money when you have a Managed Account Personal Budget.

Your key worker would be responsible for organising your support and setting up payment through the council's financial services. This is similar to the 'traditional' route and could still be the best option for some people.



Employing people

If you are going to employ a Personal Assistant using your personal budget, you will have legal responsibilities as an employer. This section is a guide to some of the things you will need to consider. There is an employment checklist at the end of this section to help get you started. There is a list of websites and telephone numbers in section 11 where you can get more information on any of these areas.

Please remember that we have tried to make this as short and easy to understand as possible. You are **strongly advised to check your responsibilities in full** before deciding to become an employer.

For further advice and support to employ or recruit a Personal Assistant, contact **People Matter IW** on 01983 241494 (10am – 4pm Monday to Thursday, 10am – 1pm Friday). Email: admin@peoplematteriw.org; Web: www.peoplematteriw.org

Or have a look at the resources available on the Skills for Care website – www.skillsforcare.org.uk or telephone them on 0113 245 1716. They have a really useful 'Employing personal assistants toolkit' which will help you through the employment process.

Employment options

The first thing to find out, if you don't use an agency, is whether the person helping you is an employee or self employed.

It is important to note that it is not for you as the employer, the employee or key worker/broker to decide whether someone is employed or self-employed. ***Only Her Majesty's Revenue & Customs (HMRC) can make this decision.*** Each case is considered on a case-by-case basis, depending on a number of factors, including the job role.

To check whether someone being paid to help you will be employed or self-employed, there is a toolkit on the HMRC website which will help to ascertain a person's employment status: www.hmrc.gov.uk or you can contact the HMRC's Status Team directly on 0300 527450 who will be more than happy to help.

Below is information about the different options available. We have produced an Employment Checklist to help you get the right things in place once you have confirmed which option to take (see page 18). This checklist is also available on www.iwight.com/adults or you can ask your key worker for a copy.

Employed directly by you

Employing someone directly can work very well. You are in complete control of who you choose to help you and what they do, which enables you to build strong relationships. You will be able to discuss any issues or problems that arise directly with your employee which can lead to you feeling more in control of how things work. You are also entitled to a notice period from the person when they want to finish working for you – this helps you to plan ahead and ensure you have ongoing support. You will need to consider how sickness and annual leave will be covered – in the case of sickness this can sometimes be at very short notice.

You will have legal responsibilities as an employer, including paying your employee's tax, national insurance and pension as well as any potential redundancy pay – if you employ 5 or more people there are additional rules you will have to adhere to.

You can obtain more information about this from People Matter IW, Skills for Care or HMRC. As part of the support available to you as an employer, there are a number of payroll services available which will take care of things such as PAYE, National Insurance, wage slips, etc. You will have to pay for these services.

Self Employed

Someone who is self employed works for themselves which means they sort out their own tax and National Insurance (NI), issuing you with an invoice at the end of every pay period. Although there are some advantages of contracting someone who is self employed – eg no payroll to sort out and no holiday or sickness payments – there are also disadvantages. For example, they may work for other people not just you, if they can't come to work they may send someone in their place and they don't need to provide holiday/sickness absence cover unless it is specified in the contract.

If, after ascertaining through HMRC that someone is self-employed, then you need to ask to see their evidence of this (an official Tax Office document) otherwise you could be liable for their tax and NI payments.

Employed through an agency

Employing someone through an agency has the advantage of ensuring that cover is provided during a worker's holiday or sickness periods. The agency will also be responsible for payroll, sickness pay and holiday pay. They will also be responsible for any disciplinary and supervisory issues – with the right relationship with the agency, you should be able to have an input into this process. One key advantage is that the worker will have been DBS (Disclosure & Barring Service) checked. There are potential disadvantages such as the possibility of being provided with different staff – although this is something you could discuss with the agency; and that the agency will make a charge for their services – what you pay per hour is not what the employee will receive.

Keeping safe

It is important that when you have someone working for you, especially in your own home, that you keep as safe as possible.

Therefore, we **strongly recommend** that you check out any potential PAs (whether employed or self-employed) as thoroughly as possible. This should include obtaining references for them from previous employers so that you can check their suitability for the job you want them to do.

We are working on a way that we can help you to get anyone that works for you, whether employed or self-employed, DBS (Disclosure & Barring Service) checked.

DBS (Disclosure & Barring Service) checks

DBS checks used to be called Criminal Records Bureau (CRB) checks. This is the new name for them. These are checks carried out on individuals and search for, and list, any previous conviction(s) for criminal offence(s). Only certain people can request that a check is carried out and only for certain roles.

The Government has made it easier for someone who has already had a DBS check to keep their check up to date and to allow employers to check the certificate on line. This is called the DBS Update Service.

Therefore, if someone already has a DBS check carried out on them from previous employment, we **strongly recommend** that you request to see it.

Health & safety

Health and safety is the responsibility of both the employer and their staff. You have a responsibility as an employer to make sure that your employees work safely and have a safe place to work. It is your employee's responsibility not to do anything that might cause you, themselves or others injury or harm.

You must always take practical and reasonable steps to reduce risk in any activity where a hazard has been identified. Where you think there might be a hazard, you will need to carry out a risk assessment. This is where you look at the risk and decide the safest way to deal with it. For example, is specialist equipment needed (eg hoist), does your employee need training (eg food hygiene if preparing food or manual handling if they are lifting you)? The Health and Safety Executive has a publication which can help with this called "Five steps to risk assessment" which can be found at: www.hse.gov.uk/pubns/indg163.pdf

You will need to think about the Health and Safety implications of your employee providing personal care. You will need to think about hygiene and things like providing your employee with gloves, etc.

It is good practice to have an emergency checklist which should include things like where the first aid kit is, where the nearest telephone is, who to contact, etc. You may need to consider whether your employee needs first aid training.

Insurance

As an employer you have a legal duty to insure against accidents or injury to your staff, or accidents or injury caused by them while they are at work for you. Here is a list of insurance that you will need to consider.

Employers' Liability Compulsory Insurance

By law, if you employ anyone you must have Employers' Liability Compulsory Insurance. It will insure you against liability for injury or illness to your employee arising out of their employment. It will enable you to meet the cost of any compensation claim for your employee's injury or illness whether caused on or off site (ie, their normal place of work – probably your home). When you take out your policy, your insurance company will send you a certificate of Employers' Liability Insurance, a copy of which **must** be displayed where your employees can easily read it (with support if necessary). There is no legal requirement for you to keep copies of out-of-date certificates of insurance, however, employers are strongly advised to keep, as far as is possible, a complete record of their employers' liability insurance.

Employers that fail to hold the necessary insurance details risk having to meet the costs of such claims themselves.

Public Liability Insurance

You should also have Public Liability Insurance; whilst this is not a legal requirement it is strongly recommended. This will insure you against any injury or damage caused to someone or their property by you or your employee while they are working for you.

Household insurance

Whilst this is not compulsory, it is recommended. You should invest in good comprehensive buildings and contents insurance to cover your property and its contents against any damage that may be caused by your employee. It is essential that you advise your insurance company if people will be working for you in your home as this may affect any claims.

Motability vehicle

If you have a Motability vehicle and you want your employee to drive it, you will need to consider insurance. You will also need to check their driving licence to ensure they have one, that they are legally able to drive and whether they have any endorsements.

Getting insured

There are a number of insurance companies that specialise in providing insurance for people who have disabilities and/or employ people. Many of them offer a range of options to cover a variety of different insurance needs (including those listed above).

Direct Care Insurance: www.homecareinsurance.co.uk or
Freephone 0800 458 3301

Ellis Bates Insurance: www.ellisbatescare.com or 01423 724518

Fish Insurance: www.fishinsurance.co.uk or Freephone 0500 432141

Premier Care Insurance: www.premiercare.info or 01476 591104

Please note: the companies listed are in alphabetical order; we do not specifically recommend any of them – they are for information purposes only.

Help!

We know employing a person sounds daunting, but there are organisations that can offer advice and support on this complex area. Please contact People Matter IW (details on page 14) or refer to the list in section 11 of this information pack.



Employment Checklist

Employment Checklist

This is a very basic checklist to get you started. For more detailed information contact People Matter¹ or go to the Skills for Care² website.

It is important to note that individuals **cannot** and **must not** make cash-in hand payments as this is illegal – people **must be** either employed or self-employed.

Please note:

It is important to note that it is not for the individual employer, the employee or key worker/broker to decide whether an employee is employed or self-employed. **Only HMRC can make this decision.** Each case is considered on a case-by-case basis, depending on a number of factors, including the job role.

To check whether someone being paid to help you will be employed or self-employed, there is a toolkit on the HMRC website which will help to ascertain a person's status around employment: www.hmrc.gov.uk or you can contact the HMRC's Status Team directly on 0300 527450.

Employed

Employer is responsible for:

- Checking the person is eligible to work in the UK
- Having Employers' Liability Insurance
- Paying tax and NI for their employee
- Providing an itemised payslip
- Providing a contract of employment

Employer is strongly recommended to:

- Make checks on the potential employee to ensure they are appropriate, including obtaining references
- Have Public Liability Insurance

Self-employed

Contractor is responsible for:

- Checking that the person is genuinely self-employed for the task they're engaged to do (use HMRC's Employment Status Indicator)
- Checking the self-employed person has liability insurance (ask to see evidence)

Contractor is strongly recommended to:

- Make checks on the potential employee to ensure they are appropriate, including obtaining references
- Receive monthly invoices to pay for services
- Check contractual arrangements (ie, notice periods, pay rates, etc)
- Have Employers' Liability Insurance
- Have Public Liability Insurance

FOR GUIDANCE ONLY

The Isle of Wight Council will not assume any responsibility resulting from an individual failing to comply with their legal duties as an employer.

¹ People Matter, Downside Learning & Community Centre, Furrllongs, Newport, PO30 2AX: tel: 01983 241494; email: admin@peoplematteriw.org; web: www.peoplematteriw.org

² Skills for Care: tel: 0113 245 1716; web: www.skillsforcare.org.uk

Financial and outcomes monitoring

The council wants to ensure that people know what their eligible needs are and that they are being met. As part of this, we need to check that the support being provided is meeting the person's needs and is being delivered to a good quality.

This is the same when you have a personal budget, whether you take it as a Direct Payment Personal Budget or a Managed Account Personal Budget. Although you choose the way you meet your outcomes and how you spend your budget, the council still needs to check that things are working well for you.

6 week review

The first of these checks, known as a review, is carried within 6 weeks from the start date of your personal budget. Your key worker will arrange to come out and review how things are going. This is to check that the package of care and support that has been set up works well for you and is able to meet your needs.

Your key worker will check that you have started to receive your money (if you are managing your finances) and receiving your support. This will include checking that you:

- are happy with how things are going;
- have either recruited or are on your way to employing any Personal Assistants;
- are satisfied with the level of support you are receiving and that it is able to meet your unmet eligible needs;
- know how to make any changes in order to help things work more effectively.

This will be your chance to talk through any concerns you have and receive support or advice to make changes. You may want to prepare for this meeting by making notes so that you are able to get the most out of this meeting.

12 month outcome review

At around 12 months, a reviewing officer will arrange to meet you to check that things are still going well. The reviewing officer will look at things like:

- Are your needs the same or have they changed since you were last seen?
- Are you still happy with how things are going?
- Does the care and support you're having still meet your needs?
- Have you achieved the outcomes as set out and agreed as part of your original support plan?
- If not, why not? If yes, what's next (this could be maintaining those good outcomes or looking at other areas that you would like to focus on)?
- If you have not been able to start achieving the outcomes set out in the original plan this could be because:
 - The original goals were unrealistic.
 - Your needs or the situation have changed.
 - You require further support to achieve the outcomes identified.
 - The money in your budget is not being used in the most appropriate areas.

Your reviewing officer will be able to advise some ways that you may like to re-work your plan to help you get focused.

Improving your plan

To make sure things are as good as they can be, you should think about what's working well and what's not working so well. Get the views of people around you who know you well, such as friends, family, PAs, providers, etc. If something didn't work well, it is worth making a note of this so that you can avoid this again in the future.

This will help you and your key worker at your review to look at things and make changes if needed.

If things change

If things change between planned reviews, for example, you're not managing as well as you were before, you think you need more help, you don't need as much help as you did, etc, you will need a review to be carried out. You should contact your key worker to arrange for them to come out to see you and reassess your needs.

Financial monitoring

The council wants to ensure that you are able to manage your Direct Payment Personal Budget and that it is being used as agreed in your support plan. We do this by writing to you eight weeks after your first payment requesting information about how you're spending your personal budget, including things like:

- Bank statements from your Direct Payment Personal Budget account
- Receipts for one off or cash payments for items or services purchased (cash should only be used in exceptional circumstances)
- Invoices
- Payslips/timesheets
- Tax and national insurance records

Following this, there will be checks at various intervals, the frequency of which will depend on the outcome of the initial check.

We will make sure you have as much support as possible to help you to manage your money successfully. However, if you have on-going difficulties we may need to look with you at other ways of managing your personal budget. At the end of the personal budget, if you have any unspent (surplus) money, it must be returned to the council.

If you need any further information or advice please contact your key worker who will be happy to help.

Personal budget examples

Below are examples of people who have had a personal budget. The examples show how they spent their money and how it has changed their lives. Their names have been changed.

Example 1 – Sarah

Sarah is in her 80s and in need of support because of her deteriorating health.

Before preparing her support plan, Sarah was using day support as the only way of having something to do or a way of going out. She asked her friends and family to form a circle of support, to help her with her plan. By making a support plan, Sarah was able to try things that she had not done for a long time.

Sarah joined a craft club near to where she lived. She also decided that, if she was ever unwell, she would receive communion from the minister at her local church, with the support of a friend.

Sarah is good friends with her neighbour, who helped her with her support plan. By using her personal budget, Sarah's neighbour was able to support her by becoming Sarah's personal assistant.

Example 2 – Greg

Greg has Downs Syndrome.

Greg's family had supported him to be as independent as possible, for example, helping him to get a job.

Greg's parents go away every weekend to their caravan, but this wasn't something that Greg wanted to continue to do. By using a personal budget, he decided to employ someone to support him when his parents were away. This was part of Greg's plan to become more independent.

The first step to getting his personal budget was to prepare a support plan. He did this using pictures and line drawings so that he could understand it.

Greg made a file which showed what he liked to do, what was important to him and how carers could support him. He used this information when he interviewed people. By having personal assistants, Greg is able to do more within his local community and do so independently.

Local organisations

Organisation	Telephone	Web
Age UK	01983 525282	www.ageuk.org.uk/isleofwight
Citizens Advice Bureau (CAB)	08444 111 444	www.citizensadvice.org.uk
People Matter IW	01983 241494	www.peoplematteriw.org

National organisations

Organisation	Telephone	Web
Department of Health (DoH)		www.dh.gov.uk
Disclosure & Barring Service (DBS) [formerly CRB]	0870 90 90 811	www.gov.uk
Health and Safety Executive (HSE)	0845 345 0055	www.hse.gov.uk
HM Revenue and Customs (HMRC)	0300 200 3200 or 0300 527450 (Status Team)	www.hmrc.gov.uk
NCIL (National Centre for Independent Living)	0845 026 4748	www.ncil.org.uk
Skills for Care	0113 245 1716	www.skillsforcare.org.uk
Social Care Institute for Excellence (SCIE)		www.scie.org.uk

Isle of Wight Council

First Response	01983 814980
Emergency Duty Team	01983 821105 (outside office hours)
Safeguarding service	01983 814980

Appeals process

We try to make sure that we always provide a high-quality service and sort problems out straight away wherever possible, but we know that there may be times when you are not satisfied. Our Appeals Process provides a simple way for you to request a review of the decision(s) and to receive a quick response.

If you want to know more about how to appeal, please ask your key worker for a copy of our Appeals Process or look on the council's website at www.iwight.com/adults.

Feedback form

If you have any comments on this pack, please let us know using this form.

	Yes	No	Comments
1) Was the wording easy to understanding?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
2) Was the layout easy to follow?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
3) What information would you have liked to have been given that wasn't included?			<input type="text"/>
4) What information was included that you didn't think was useful?			<input type="text"/>
5) Other comments:			<input type="text"/>

Please return this completed form to:

Personalisation Team
 Isle of Wight Council
 Floor 2, County Hall
 High Street, Newport
 Isle of Wight, PO30 1UD
 Telephone: 01983 821000

If you have difficulty understanding this document, please contact us on 01983 821000 and we will do our best to help you.

Arabic

إذا كان لديك صعوبة في فهم هذه الوثيقة، الرجاء الاتصال بنا على هاتف رقم 01983 821000 وسوف نبذل قصارى جهدنا لمساعدتك.

Hindi

यदि आपको इस दस्तावेज़ को समझने में कठिनाई पेश आ रही है तो, कृपया हमारे साथ 01983 821000 पर सम्पर्क करें और हम आपकी सहायता करने का पूरा प्रयास करेंगे।

Punjabi

ਜੇਕਰ ਤੁਹਾਨੂੰ ਇਹ ਦਸਤਾਵੇਜ਼ ਸਮਝਣ ਵਿਚ ਮੁਸ਼ਕਲ ਪੇਸ਼ ਆ ਰਹੀ ਹੈ ਤਾਂ ਕ੍ਰਿਪਾ ਕਰਕੇ ਸਾਡੇ ਨਾਲ 01983 821000 'ਤੇ ਸੰਪਰਕ ਕਰੋ ਅਤੇ ਅਸੀਂ ਤੁਹਾਡੀ ਸਹਾਇਤਾ ਕਰਨ ਦੀ ਪੂਰੀ ਕੋਸ਼ਿਸ਼ ਕਰਾਂਗੇ।

Urdu

اگر آپ کو اس دستاویز کو سمجھنے میں مشکلات کا سامنا ہو تو برائے مہربانی ہم سے اس نمبر پر رابطہ کیجئے 01983 821000 اور ہم آپ کی مدد کرنے کے لیے ہر ممکن کوشش کریں گے۔

Chinese

如果您对此份文件难以理解，请致电01983821000与我们联系。我们将力尽所能帮助您。

Bengali

এই তথ্য বুঝতে না পারলে অনুগ্রহ করে আমাদেরকে 01983 821000 নাম্বারে ফোন করবেন। আমরা আপনাকে যথাসাধ্য সাহায্য করবো।

Polish

Jeśli mają Państwo trudności w zrozumieniu niniejszego dokumentu, prosimy o kontakt z nami pod numerem 01983 821000 – dołożymy wszelkich starań, by Państwu pomóc.

French

Si vous avez des difficultés à comprendre ce document, veuillez nous appeler au 01983 821000 et nous ferons de notre mieux pour vous aider.

Italian

Per ulteriori chiarimenti su questo documento, Vi preghiamo di contattarci per telefono al numero 01983 821000 dove riceverete la nostra migliore attenzione.

German

Sollte es Ihnen Schwierigkeiten bereiten, dieses Dokument zu verstehen, rufen Sie uns bitte an unter 01983 821000, und wir werden unser Bestes tun, um Ihnen zu helfen.

Hungarian

Ha nehézséget okoz e dokumentum értelmzése, kérjük, forduljon hozzánk a 01983 821000 számon, és minden tőlünk telhetőt megteszünk, hogy segítsünk.

Spanish

Si tiene dificultad para entender este documento, por favor póngase en contacto con nosotros llamando al número 01983 821000 y haremos todo lo posible para ayudarle.

Romanian

Dacă aveți dificultăți în înțelegerea acestui document, vă rugăm să ne contactați la numărul 01983 821000 și vom face tot ceea ce putem să vă ajutăm.