

“Personal Budget (PB) Checklist”

WHAT NEEDS TO HAPPEN NEXT?	✓	WHO WILL DO IT?
<ul style="list-style-type: none"> I should complete a personal budget questionnaire 		Me and my Care Assessor
<ul style="list-style-type: none"> I should receive a copy of the personal budget guidance and support planning leaflet 		My Care Assessor
<ul style="list-style-type: none"> I need to sign a consent form (to authorise a financial assessment) and a Data Protection Form 		My Care Assessor
<ul style="list-style-type: none"> I should receive a copy of my completed personal budget questionnaire 		My Care Assessor should give me this
<ul style="list-style-type: none"> I should receive an estimated figure for my personal budget 		My Care Assessor should give me this
<ul style="list-style-type: none"> I should have a financial assessment and should know what my contribution will be 		JVT (financial assessment team) Tel: (01603) 638086 My Care Assessor should also have this information
<ul style="list-style-type: none"> I need to decide if I want support with producing my support plan or if I will do this myself 		Support can come from family/ friends, Care Assessor or, if agreed by my care assessor, a NCC approved Support Planning provider
<ul style="list-style-type: none"> If required, a referral should be made to the Support Planning provider of my choice 		I can do this myself or my Care Assessor can do this on my behalf

**SUPPORT PLANNING CAN NOW BEGIN
(THIS SHOULD BE PRODUCED IN THE FORMAT OF MY CHOICE)**

<ul style="list-style-type: none"> I should have had a discussion regarding what I need to include in the 'Keeping Myself Safe' part of my support plan 		Me and my Care Assessor
<ul style="list-style-type: none"> I should decide how my needs can be met (identified in the personal budget questionnaire) 		Me with support if required from my Support Planning provider
<ul style="list-style-type: none"> I will need costs for any continuing or new directly commissioned services 		My Care Assessor should give me these costs
<ul style="list-style-type: none"> I will need costs for anything I want to use my personal budget for 		Me with support if required
<ul style="list-style-type: none"> I should seek employment advice if I am planning to employ someone 		I should contact Equal Lives' Information, Advice and Support service or other chosen organisation e.g. ACAS. If I need in depth recruitment and employment support and an allocated adviser I will need to choose an NCC preferred provider to support me and have these costs agreed within my support plan.
<ul style="list-style-type: none"> My support plan can now be completed 		Me with support from my Support Planning provider
<ul style="list-style-type: none"> My support plan is complete and ready for approval 		I will contact my Care Assessor to let he/she know

ONCE MY PLAN HAS BEEN SIGNED AND APPROVED BY MYSELF AND MY CARE ASSESSOR'S MANAGER

<ul style="list-style-type: none"> I should sign a direct payments terms and conditions form, if I am having a direct payment as part of my plan 		My Care Assessor should give me this
<ul style="list-style-type: none"> I should begin to recruit or let my chosen NCC preferred provider know I am ready to recruit someone 		Me with support from my Employment provider
<ul style="list-style-type: none"> I will need to let my chosen NCC preferred provider know if I want them to hold my money in a 		I will let my Supported Account provider know I want to use their service

supported account		
<ul style="list-style-type: none"> If I have chosen a NCC preferred provider for Employment and/or Payroll services I will need to let them know I have recruited 		I will contact my provider to pass on my employee(s) details
<ul style="list-style-type: none"> I should receive a letter to confirm that the money is in place 		This should be sent by Direct Payments Office Tel: (01603) 638170
<ul style="list-style-type: none"> New directly commissioned services should be arranged 		My Care Assessor
<ul style="list-style-type: none"> I should set up any other services required, as detailed in my support plan 		Me with support if required
<ul style="list-style-type: none"> I should receive a copy of my signed support plan 		My Care Assessor should give me this
OTHER CONSIDERATIONS		
<ul style="list-style-type: none"> If applicable a standing order should be set up to pay my personal contribution, either with a NCC approved Supported Account service or into my own dedicated account 		Me with support if required. I should request my chosen providers bank details if I am using their Supported Account service
<ul style="list-style-type: none"> I should have a review as detailed in my support plan 		Me and my Care Assessor
<ul style="list-style-type: none"> If I plan to hold part or all of the direct payments monies myself, I will receive a Financial Monitoring pack 		This should be sent by Direct Payments Office Tel: (01603) 638170
NOW I'M READY TO PUT MY SUPPORT PLAN INTO ACTION		