

Factsheet A11: Making Payments from your Supported Account

As part of your Personal Budget or Personal Health Budget, you may have decided to use a service provider or a self-employed person to provide you with a service. You may also have an agreement in your Budget to purchase other items. This advice sheet explains how to make payments and access your money if you are using Equal Lives' Supported Account service. If you use a Payroll service to pay your employee(s) their wages, this information can be found in the Payroll advice section.

Paying Invoices and Insurance

It is your responsibility to check the amount charged on any invoice is correct, ensure you have enough money allocated in your agreed funding to cover these costs, and that the spending has been agreed. If your service provider increases their rates, you may need to get your funding increased to make sure you don't run out of money. If you receive a Personal Budget, you should call Norfolk County Council on 0344 800 8020 or speak to your care assessor. If you have a Personal Health Budget, you should call 01603 257257 or speak to your support officer.

You will need to send the invoice to us so we can pay it from your Supported Account. In order for the invoice to be processed and for us to provide financial monitoring information as required, it must include:

- Your name and address (person receiving the funding)
- The name and address of the service provider
- The invoice date, invoice number or other reference number
- The amount to be paid and information about what the payment is for
- The period the invoice covers, if applicable



- Your signature or your authorised signatory
- Details of the bank account to be credited, the account holder's name, bank sort code (6 digits), account number (8 digits) and building society reference (if applicable) **OR** the name any cheques are to be made payable to

Paying invoices to any service providers will be carried out within 14 days of us receiving the authorised invoices from you. If the invoice does not include all of the information required, we may not be able to pay it and may have to return it to you in order to complete the missing information.

Claiming money from your Supported Account

You will need to submit your request in writing by post, by fax, or from your authorised email address to our Payroll and Finance team (you must ensure you have requested to set up your e-mail address with us). Our email address is timesheets@equallives.org.uk. You will need to complete a Service User Claim Form and a Bank Details Form and these can be requested from us as required. We only need your bank details once, providing all payments are to be made to the same place each time. If your bank details change, you must inform us in writing or by using a new bank details form.

Requesting money upfront

If you want to claim your money up front, but don't have a receipt yet, use the Service User Claim Form and select Option 1, or tell us in writing that you are claiming the money in advance. If you have already claimed the funds from your account and are simply sending in your receipts now you have them, please use Option 3 on the Service User Claim form to ensure we don't pay them again, or tell us in writing you have already received the funds.



If you receive a Personal Budget, you must send us receipts for individual items costing more than £50, and we pass these to Norfolk County Council.

For a Personal Health Budget, there is a separate tick box you must select on the Service User Claim Form you must select. Keep all the receipts yourself – DO NOT send these to Equal Lives.

Requesting a reimbursement – if you have already paid for it

To reimburse yourself for any money you have already paid privately yourself for items, select Option 2 on the Service User Claim Form.

If you receive a Personal Budget, send in the receipts for any individual items costing more than £50 with your Claim Form or written request for payment.

For a Personal Health Budget, there is a separate tick box you must select on the Service User Claim Form. Keep all the receipts yourself – DO NOT send these to Equal Lives.

The information we need for any claims

To successfully process your claim (claim form or in writing), we need to know:

- Your name and address (person receiving the funding)
- The amount claimed and brief details about what the payment is for, including the dates covered, if applicable
- Whether this is a request for monies in advance or reimbursement for money you have already spent
- **Signature of person receiving the direct payment / funding or their authorised signatory**
- Details of the bank account to be credited, including the account holder's name, bank sort code (6 digits), account number (8 digits) and building society reference (if applicable) **OR** the name any cheques are to be made payable to



Please note that it can take up to 14 days from us receiving your claim for the money to arrive. When bank holidays occur, this could take a little longer. Consider submitting any claims earlier than normal to ensure you receive the funds in suitable time if they are required by a certain date.

If you require further information, need any of the forms mentioned in this factsheet or would like this factsheet in an alternative format you can contact us by calling: 01508 491210, by emailing: info@equallives.org.uk, or by writing to: Equal Lives, 15 Manor Farm Barns, Fox Road, Framingham Pigot, Norfolk, NR14 7PZ.

