**Cash/Mixed Personal Budget Checklist**

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| **Checklist to be completed for Cash/Mixed Personal Budgets** | **Check** |
|  | Contact allocated by TA as directed by Team Manager or Senior Social Worker, assessment created and sent directly to Social Care Mobile – worker to check AIS task list for a new contact. | ☐ |
|  | Worker to ensure AIS involvements are correct to ensure synching on SCM is successful. | ☐ |
|  | Privacy notice for Adult Social Care has been issued | ☐ |
|  | Consider issuing appropriate Care Act factsheets. | ☐ |
|  | Worker to read information gathered from SIDT/Hospital Team and consider need for an advocacy referral (substantial difficulty understanding the assessment process/IMCA). Referral form is on the intranet. | ☐ |
|  | Strength based conversation to be held to determine if an assessment is necessary – send appointment letter. | ☐ |
|  | Worker to complete Care and Support Assessment if appropriate. Evidence of positive risk taking and risk assessment as necessary. | ☐ |
|  | Worker to establish whether if LPA has been registered and if so, worker to sight the original and request copies. | ☐ |
|  | Worker to complete OPG100 if above not established and record reference number on AIS. | ☐ |
|  | Worker to issue appropriate Care Act factsheets. | ☐ |
|  | Worker to issue provisional notification (Charges for Non-residential care and support services) and obtain signature. Ensure 2 copies 1 for service user and 1 to scan and index . | ☐ |
|  | Worker to obtain signature on Declaration B of financial assessment if person is self-funding or does not wish to disclose financial circumstances. *Mixed budgets - , inform individual of arrangement fee for non-residential care and support services. Issue letter and obtain signature Ensure 2 copies 1 for service user and 1 to scan and index.**When providing a “paper based” DP to self-funders they must be informed of the appropriate arrangement fees and a letter should be issued.* | ☐ |
|  | Worker to complete a Continuing Health Care checklist as needed. | ☐ |
|  | Offer a Carers Assessment if application (see separate guidance for completion of Carers Assessment). | ☐ |
|  | Complete Fullers Assessment as required – Mixed budgets only (see separate guidance for completion of Fullers Assessment).  | ☐ |
|  | If it is clear the individual is not eligible then inform them and their carer/advocate. | ☐ |
|  | If the individual is eligible for support then inform them and discuss what outcomes they would like to achieve. | ☐ |
|  | Worker to send not eligible letter if appropriate with a copy of the assessment. | ☐ |
|  | Worker to send requests for information ( “comms”) as necessary. | ☐ |
|  | Worker to complete RAS document. | ☐ |
|  | Worker to input a Welfare Rights contact unless Dec B signed. Mixed budget only | ☐ |
|  | Seek approval in principle for proposed care and support arrangements for a cash/mixed budget. | ☐ |
|  | Worker to complete a person centred care and support plan with the person/family/carer – evidence of maximising independence and consideration of equipment/other referrals (eg Falls Clinic, OT, Physio), signposting to other relevant services/use of community and personal assets/networks. Care and Support Plan should be signed by person/person’s representative and worker. | ☐ |
|  | Refer to DPSO’s where a carer is to be employed. | ☐ |
|  | Worker to follow Adult Commissioning Panel funding process and submit necessary documentation to TM/AM/SSM for formal approval (timescale 6 weeks). |  |
|  | Complete Eforms/CERT ie PB start and bank details (dependent upon cash or mixed) | ☐ |
|  | Worker to distribute assessment/CASP as necessary to relevant parties. | ☐ |
|  | Worker to ensure all documents are scanned (signature sheet, provisional notification, Dec B, CHC checklist, RAS, CASP signature, arrangement fee letter, etc.). | ☐ |
|  | Referral to Humberside Fire & Rescue Brigade considered? |  |
|  | Confirmed privacy notice has been issued |  |

Worker Name:

Worker Signature:

Final Completion Date of Checklist:

NOTES TO CONSIDER:

* Consideration of equality and diversity
* Consideration of any Safeguarding concerns/Domestic Violence
* Evidence of Joint Working
* Community DOL considered