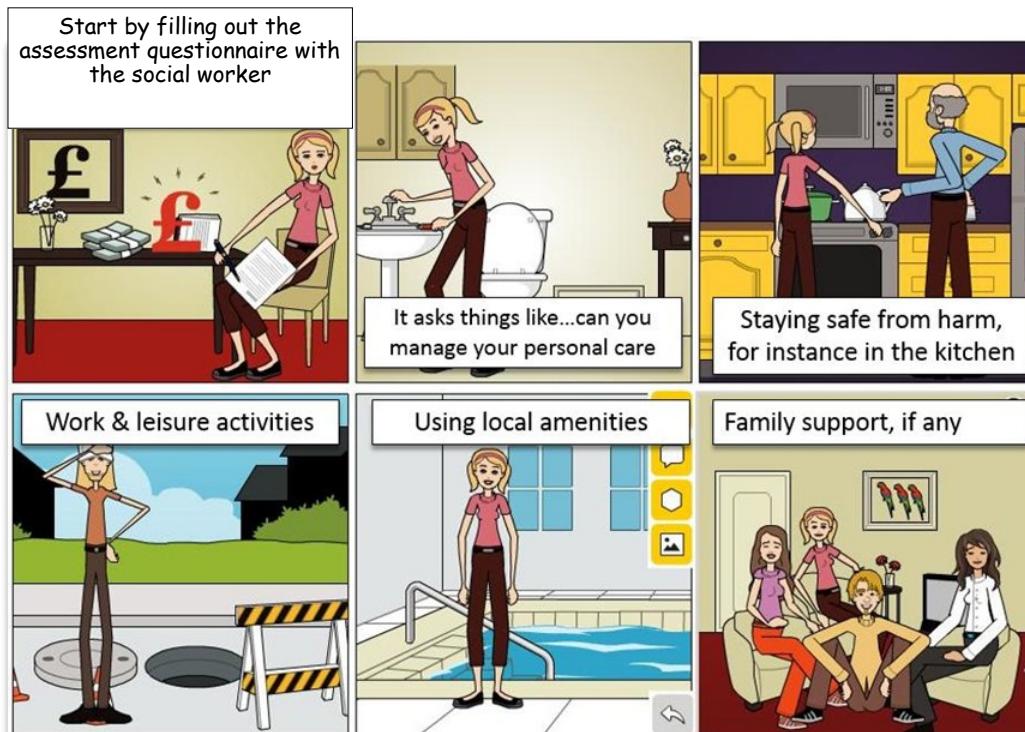


## Self-directed support

# Money: finding out how much you'll get

This fact sheet tells you about assessment and resource allocation. You start by having an assessment carried out by a social worker from your council.



Everyone is entitled to an assessment of their needs and to information advice and guidance. You may be eligible for more help if:

- Your need for support results from physical or mental impairment, illness or disability, and
- You need support to (or are unable to) achieve outcomes in two or more areas of life, and
- Not achieving these outcomes would result in a significant impact on your wellbeing.



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## Self-directed support

If you have savings above a certain limit you will have to meet some or all of the cost of your own care and support. Local authorities have some discretion about how these arrangements work so it is important to ask them about their arrangement for financial assessment.

### The basic facts

**One of the important features of self-directed support is that people should be able to find out quickly how much money they will have for support.**



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People can only be in control of their support if they know how much money they are entitled to.

Anyone who already runs their own home knows it would be impossible to buy or rent somewhere to live, buy furniture, do the shopping or go on holiday if they didn't know how much money they had to spend.



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It's the same for self-directed support.

Local authorities may have a resource allocation system – a simple and transparent way of deciding how much money is enough for support.



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## Self-directed support



### More information about assessment and resource allocation

You need to find out how much money you are able to get for your support.

To do the assessment, the social worker will fill in a form about:

- You
- Your life
- The support you need

In Control recommends that people fill out as much of this assessment on their own as they can, if they can and want to. In Control talks about supported self-assessment as part of the process.



But each local authority does things a bit differently. Some local authorities talk about 'self-assessment' and some don't. However, every local authority should have a way of finding out about you, your life and the support you need, so they can make a fair allocation of money.



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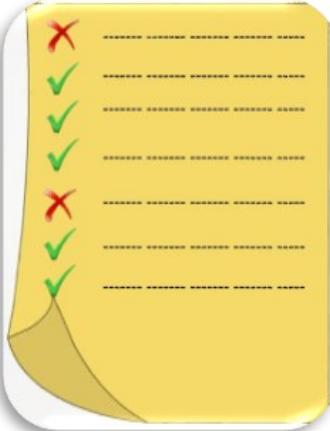
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## Self-directed support

### If you need help in the assessment



The assessment questions help the local authority decide whether they will provide or continue to provide help and if so how much help or budget you may get.

So if you have difficulty understanding information, or you have difficulty communicating your views, and there is no one you would like to help you, they must arrange an independent person, an advocate, to help you in the assessment.



The independent person understands how the local authority reaches decisions and will spend time with you to help you understand and be fully involved in the assessment, planning and review processes.



They can also help you think about your needs and reach decisions about how you want them to be met. The person will help make sure you understand your rights and what you can expect from the local authority. They can also help you challenge a decision made by the local authority. You can ask for an independent advocate at any point in the process.



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# Self-directed support

## More detail

### The assessment

#### The form:

- Should be practical and easy to answer. One of the important things about self-directed support is that the rules and information must be clear and easy to understand
- Must take the needs of the person and their family into account.
- It should make clear what outcomes the local authority expects you to achieve if you have the right support
- Should tell you if you are entitled to other kinds of funding.
- Should trigger a benefit check, so you can make sure you are getting everything you are entitled to.



#### The purpose of the assessment

The assessment is important as it will affect what, if any, support you get. Everyone has a right to be assessed by someone able to do it well.



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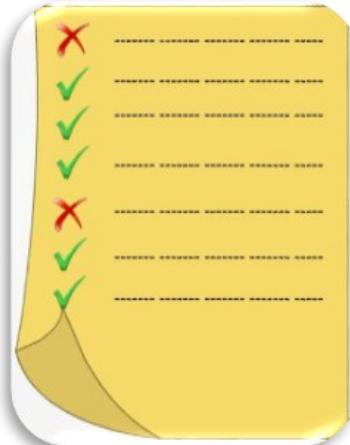


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## Self-directed support



The assessment is there to help you and the local authority understand your needs and the support you may get. It should identify what outcomes you are looking to achieve. It should not just focus on things you struggle with, but also help you understand your strengths and capabilities.



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Before the assessment, you should be given a copy of the questions and at the end of the process you should be given a copy of the assessment.



The assessment should provide you and the local authority with a full picture of your needs so they can provide an appropriate response.



During the assessment, the local authority should establish the impact of your needs on your day-to-day life and how this affects your wellbeing. You and your family should be at the centre of the assessment.

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The local authority must think carefully about the role of your family carers. (They can't just assume they will carry on providing support).

## Self-directed support

Thanks for helping me with the form.



Your plan is fine, here's your budget.



Do I have to pay towards my budget?



**This varies from place to place, but it should be something like this:**

- You can fill the form in yourself or with help from a family member, social worker or care manager, for example. Some local authorities may insist that you fill in the form with a care manager or social worker.
- When you have an assessment, the local authority should tell you about any charging system they have. 'Charging' means getting you or the person to pay for some or all of their support.
- When you have had an assessment, you should know the 'indicative budget'. This is the rough figure to work on when you go to the next step: making your support plan.
- When you've made your support plan, you need to meet with a care manager or social worker. If they agree your plan, you get a firm amount. This is called your personal budget.



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## Self-directed support

**Remember to ask the local authority:**



- How long the money will be available to you?
- What the money can and can't be spent on?
- How they will give you the money? Is it weekly, monthly or quarterly?
- What guidance and support they can give about managing the money?



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# Self-directed support

## The questions on the assessment



**The assessment questionnaire is often based on the domains set out in national eligibility regulations:**

- Managing and maintaining nutrition.
- Maintaining personal hygiene.
- Managing toilet needs.
- Being appropriately clothed.
- Being able to make use of the home safely.
- Maintaining a habitable home environment.
- Developing and maintaining family or other personal relationships.
- Accessing and engaging in work, training, education or volunteering.
- Making use of necessary facilities or services in the local community, including public transport and recreational facilities or services.
- Carrying out any caring responsibilities the adult has for a child.



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# Self-directed support



## Other assessments

Some people also need to do other assessments. For example: occupational therapy, or continuing healthcare if you have multiple health needs, or if support is complex and unpredictable.



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## Disagreements about the assessment

If you don't agree with the resource allocation, you should ask for a re-assessment. Speak to your social worker or care manager. If you feel you can't speak to them, you can ring up your local social work centre and request a complaints form.



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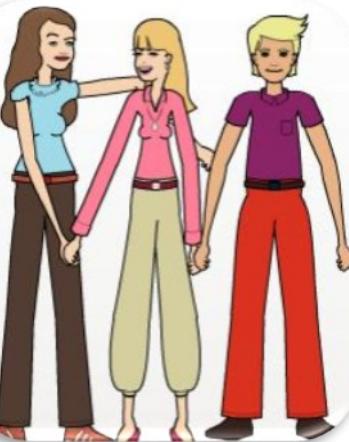


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# Self-directed support

## Some examples

### Julia Winter



"It starts off with an assessment, which is a question and answer form asking questions like: do you live with anyone else or do you live alone?

The people that you live with: are they able to give you lots of support or not very much support? And then more of the kind of medical questions about what help you need with washing, dressing, that kind of thing."



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## Self-directed support

### Caroline Tomlinson, Joseph's mother

"What we have done is go through an assessment process. That is where you are given a questionnaire where you fill in the questions and you are awarded points for answers.

We went through that process. It only took a few minutes to really identify Joseph's needs. After we had completed that, the social worker added up the points. Each point is worth so many pounds and we were told this is how much money you are entitled to. So in our situation we looked at how much money we were entitled to and we did have further debate and discussion about whether we believed that amount would actually meet Joseph's needs. So you don't have to take that as the firm bottom line answer.

There is a challenge process if you think that it isn't appropriate and you think you can clearly demonstrate that the money wouldn't actually meet the person's needs. We used the support plan to demonstrate clearly how much we needed to keep Joseph healthy, safe and well."



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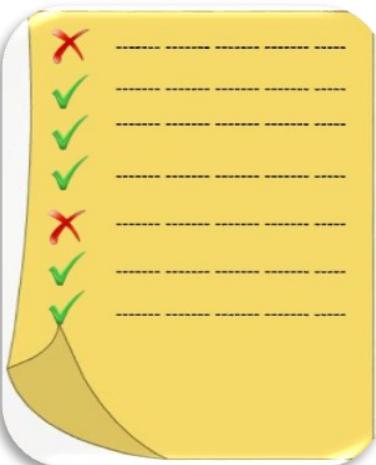
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# Self-directed support

Gavin Croft



“Under the self-directed support system you complete the simple questionnaire. It's just tick boxes really. It focuses more on the effects your disability has on your life – so how can you live your life, still live your life with a disability, how can we help you to do that?”



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## Self-directed support

**Cindy Peacock**



“I have got a visual impairment. I am actually registered as blind. When I was on direct payments, all I knew was that I was getting 25 hours a week. I did not know how much money it was costing or anything else but on individual budgets, they tell me exactly what the cash equivalent is so I know how much money I have a year and I know what I can do with the money – I can spend it how I please as long as it meets all my needs.”



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## Self-directed support

George Doubleday



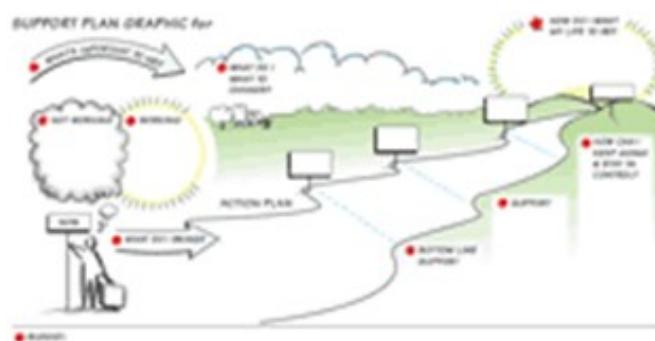
“Some mathematical equation was done and it equalled my original budget. But I knew roughly how much it was going to be. I got an answer quite quickly so I did my plan around that amount of money.”



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