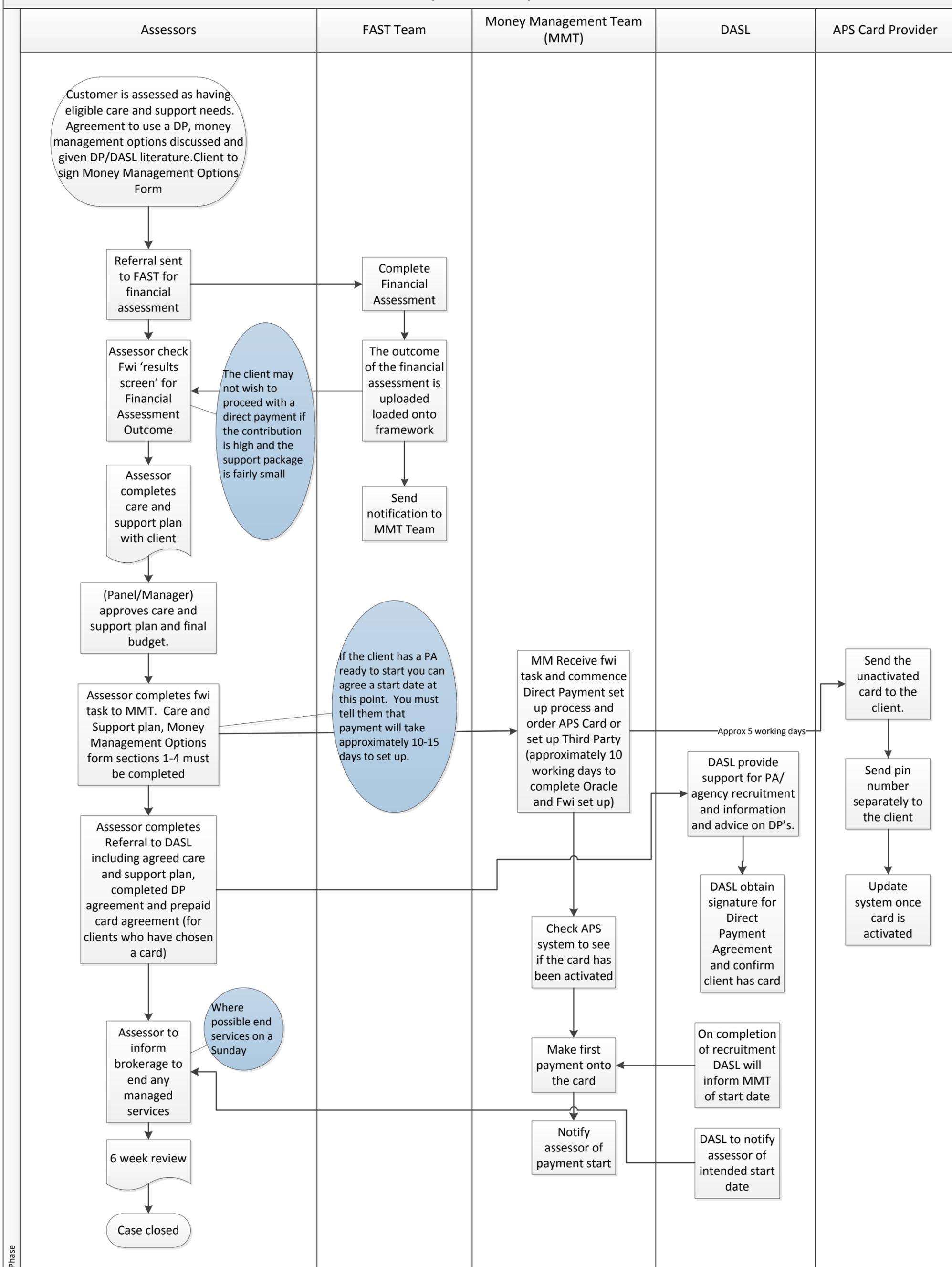


Direct Payment Set Up Process



Phase

Direct Payment Set up Process

1. Prior to the assessment visit, it is important for the assessor to check if the client is known to the financial assessment team and has had a financial assessment completed. If the level of support is likely to be very low and it is likely that the client will have to pay a financial contribution they may not wish to proceed.

2. Following assessment if it is clear that the client will require on-going support, the assessor should discuss Direct Payments and the benefits of using a Direct Payment. The Direct Payments Pack provides additional detailed information. The DP Pack is available on the Adult Social Care Sharepoint.

3. Discuss with the client the Direct Payment management options and their ability to manage the Prepaid Card or if a family member can manage this on their behalf. If they are not able to do this, Lambeth can provide additional support to hold the Direct Payment funds and pay for services or employee's wages on their behalf. This is called a Third party arrangement. We have a number of payroll organisations that will provide support to calculate wages for employees. The assessor will need to confirm with the client what option they wish to take – Prepaid Card or Third Party. If they have chosen a Pre-paid Card they will receive it in the post. The Card will not be activated and it will have a £0 balance. They will need to activate the card once they receive it. This can be done online or by telephone to APS who supply the cards.

4. Once the assessment is completed, the assessor should send a referral to FAST to complete a financial assessment. Please ensure the financial assessment form is completed as fully as possible as missing information can delay the outcome. The Team will complete the assessment and when completed the outcome will be available on the results screen on framework.

5. It is important to check again at this stage if the client has to make a financial contribution. If the support package is fairly small (under 10 hours) and they have to contribute towards the cost of their care, they may not want to proceed to taking a direct payment.

6. The assessor will complete the Care and Support Plan with the client's agreement. The plan will need appropriate sign-off and should include the agreed budget. The assessor must complete the Direct Payment Agreement and include the final agreed budget.

7. Once the Care and Support Plan is complete, this should be tasked on Framework to the Money Management Team. This begins the Direct Payment set up process. Please complete sections 1-4 on the **Money Management Options form** and send it to the Money Management Team. **The set up process cannot begin until this step has been completed.** Please ensure the following are completed:

Care and Support Plan
Direct Payment Agreement (unsigned)
Prepaid Card Agreement (unsigned)
Financial Assessment

8. If the client has a Personal Assistant ready to start, the assessor can agree a start date at this point. The assessor should inform the client that payment will take approximately 10-15 days to set up.

9. The assessor will make a referral to DASL and attach the agreed **Care and Support Plan**, the **Direct Payment Agreement** and the **Prepaid Card Agreement** (if the client is having a prepaid card). Please ensure the agreements have been updated with the client's details and the Direct Payment and Finance charges amounts. DASL will obtain the signatures from the client.

10. DASL will provide support for recruitment and provide additional information and advice on Direct Payments. Once the recruitment is completed, DASL will notify the assessor and the Money Management Team of the intended start date.

11. The assessor must liaise with the Brokerage Team to end current managed services. Where possible services should end on a Sunday. The assessor should inform the client that the managed services are due to end.

12. The Money Management Team will make the first payment. Payments are made 4 weeks in advance and the first payment includes a contingency amount and enough money to cover employers liability insurance.

Direct Payment
Set up complete