

Policy Library Pro Forma

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Title: Reviewing Personal Budgets Policy

Aim / Summary:

To set out the Council's commitment to reviewing personal budgets; to ensure that public money is being spent properly, and to ensure that service users and carers are in receipt of the support outlined in their support plan and that they are satisfied with the support they receive.

Document type (please choose one)

Policy	x	Guidance	
Strategy		Procedure	

Approved by:

Version number:1

Date approved:

Proposed review date:

Subject Areas (choose all relevant)

About the Council		Older people	x
Births, Deaths, Marriages		Parking	
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Please include any supporting documents

1.Reviewing Personal Budgets Guidance

2.

3.

Review date

Amendments

Context

1. The County Council is committed to ensuring that:
 - Local people are enabled to live as independently as possible throughout their lives.
 - Where people need social care support they are enabled to have as much choice and control as possible over how it is provided.
 - All services are good quality and provide value for money.
2. This policy sets out the Council's commitment to reviewing personal budgets to ensure that public money is being spent properly and that service users and carers are satisfied with the support they receive.

Scope of this policy

3. This policy covers the review of personal budgets for people living in the community and those living in a care home.
4. The legal framework governing reviews for social care support is set out in [Prioritising need in the context of Putting People First: A whole system approach to eligibility for social care – Guidance on Eligibility Criteria for Adult Social Care, England 2010.](#)
5. This policy is consistent with the requirements of this legal framework, which states that:
 - The frequency of reviews should be proportionate to the circumstances of the individual, but there should be an initial review within three months of help first being provided or major changes made to current support plans. After that reviews should be scheduled at least annually, depending on circumstances such as mental capacity (which requires more regular reviews) and requests for a review by the service user or other persons connected with the service user.
 - The process of review should be simple and avoid duplication or unnecessary amounts of paperwork or visits.
 - Particular attention should be paid to the need for more frequent monitoring of adults who lack capacity. It highlights the need, specified in the Mental Capacity Act Code of Practice, to involve Independent Mental Capacity Advocates in reviews, 'where the person concerned has no-one else to be consulted'.

Principles and Commitments

6. The Council is committed to enabling service users and carers to play an active part in the review of their personal budget to make sure that the outcomes they anticipated from their support are being achieved.
7. The number of reviews for the same service user will be reduced in order to help manage the high volume of reviews and to improve efficiency. Other related reviews, for example, for continuing health care and for carers will be done at the same time as the personal budget review, where possible.
8. Reviews will be “proportionate” to the situation. This means that reviews can be completed in different ways: face to face; by correspondence or telephone; by using a surgery approach in care home and some day care settings. The type of review will be determined by the reviewing officer and agreed by their team manager.
9. Priority for face to face reviews will be given to service users whose needs are defined as “complex” or who are assessed as particularly vulnerable or at high risk. All service users with a personal assistant, and where a relative is employed, will have a face to face review.
10. In defined circumstances an adjustment to a support package can be made without the need for a formal review.
11. The review will include detailed attention to the finances of any direct payment made to the service user or “suitable person”, to ensure that public money is being properly spent.

Key actions to meet the commitments set out in the policy

12. The Council will undertake the following key actions to meet the commitments set out in this policy:
 - Maintain up to date guidance for staff to ensure that this policy is applied consistently across all service users and carers, including those living in residential care and in receipt of aids and adaptations.
 - Take appropriate action if the findings of the review suggest that public money is being used inappropriately or inefficiently.
 - Monitor the outcome of reviews in order to respond to any quality assurance issues raised about the social care support provided or arranged by the Council.