



Referral (Council)	Wellbeing Assessment (Council)	Introduction to Direct Payments Eligibility	Direct Payments Suggestion & Visit UPDATED PROCESS	Service User Decision	Finance & Case Manager Authorisation UPDATED PROCESS	Package Setup Visit UPDATED PROCESS	3 Routes SAP	Direct Payment Active UPDATED PROCESS
<p>Referrals come into Community Support Team from:</p> <ul style="list-style-type: none"> • C2C • MASH • GP • Intake & Assessment <p>Learning Disability, Mental Health and Children's Services referrals go straight to the relevant teams.</p>	Internal Social Services process	<p>A detailed explanation of Direct Payments is provided to SU/family and if interested then they are assessed for eligibility</p> <ul style="list-style-type: none"> • New script • New DP policy <p>If not entitled to LA assistance, applicants are signposted to other services/third sector partners</p>	<p>Case Manager visits to suggest DP and provide comprehensive overview of DP process:</p> <ul style="list-style-type: none"> • New information pack • Support information • Banking terms & conditions • Recruitment advice including adverts/JDs/interviewing • Appointment advice including HMRC/employment law/pensions/insurance • Managed banking T&Cs banking advice payroll hmrc • Information sharing protocol • PA/Agency/Residential options • Local Authority required forms <p>VOs attend SU at the same time to conduct financial referral</p>	<p>If DP not requested, then traditional care package put in place through Children's Services brokerage process and Adam</p>	<p>Case Manager confirms that SU/family is interested and initiates ASWB and other finance processes</p> <p>Case Manager refers to Managed Banking provider</p>	<p>Provider visit SU/family to set up final package options using a picklist:</p> <ul style="list-style-type: none"> • Specific package requirements • Banking type • Which route • Sign banking documents • Sign T&Cs <p>Mandate signed and delivered back to finance</p>	<p>Start date agreed between SU/Case Manager/provider</p> <p>Start date submitted to brokerage</p> <p>Finance sets up 4-weekly payments in SAP</p>	<p>Monitoring and auditing done through a single Direct Payments team based within the Council</p>

