

# Purchasing an ongoing or one-off

## Carer Direct Payment

This guide is for setting up an ongoing or one-off Carer payment via Direct Payment. For increasing, decreasing or ending an existing ongoing Carer Direct Payment, please see the *Amending a Direct Payment Guide*.

Please note, if you are setting up an ongoing Carer Direct Payment, then the relevant payroll company needs to be involved around organising a prepaid card for these payments to be made.

### The Mosaic process of purchasing a Carer DP, in summary:

- Open a Purchase Service (Personal Budget) workflow step
- Provide the missing information required under the Budget tab
- Add the Direct Payment provision under the Provision and Contributions tab
- Add a Carer element to that Direct Payment provision
- Send for authorisation to your manager
- Once authorised, select a next action of 'Purchasing Outcome'
- Then FINISH with the green tick, and a Purchase Order will be generated.

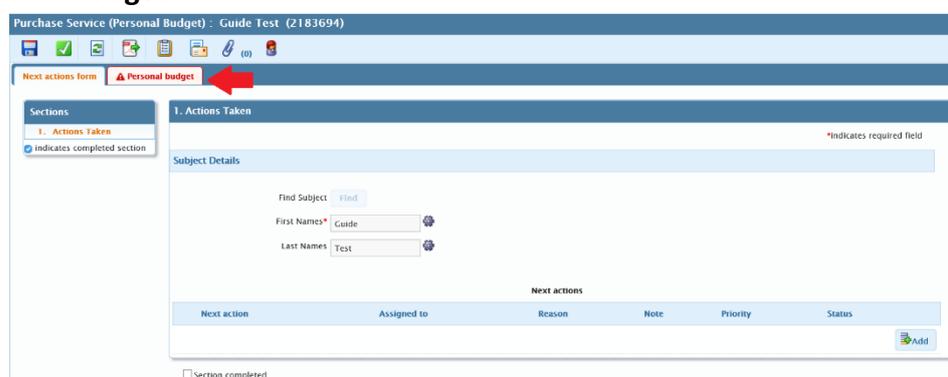
## Opening a Purchase Service (Personal Budget) workflow step

You will generate a **Purchase Service (Personal Budget)** step, from your Carer Conversation workflow step or your Carer Review workflow step.

You are assigning this to yourself, as you the practitioner are completing the purchasing for Direct Payment.

### Navigating the Purchase Service (Personal Budget) workflow step:

- When you first open this step, you will see two tabs. The 'Next actions' tab can be completed at the end. To start the purchasing of a Direct Payment, you need to click on the '**Personal budget**' tab:



Purchase Service (Personal Budget) - Guide Test (2183694)

Next actions form Personal budget

Sections

1. Actions Taken

Indicates completed section

Indicates required field

Subject Details

Find Subject Find

First Names\* Guide

Last Names\* Test

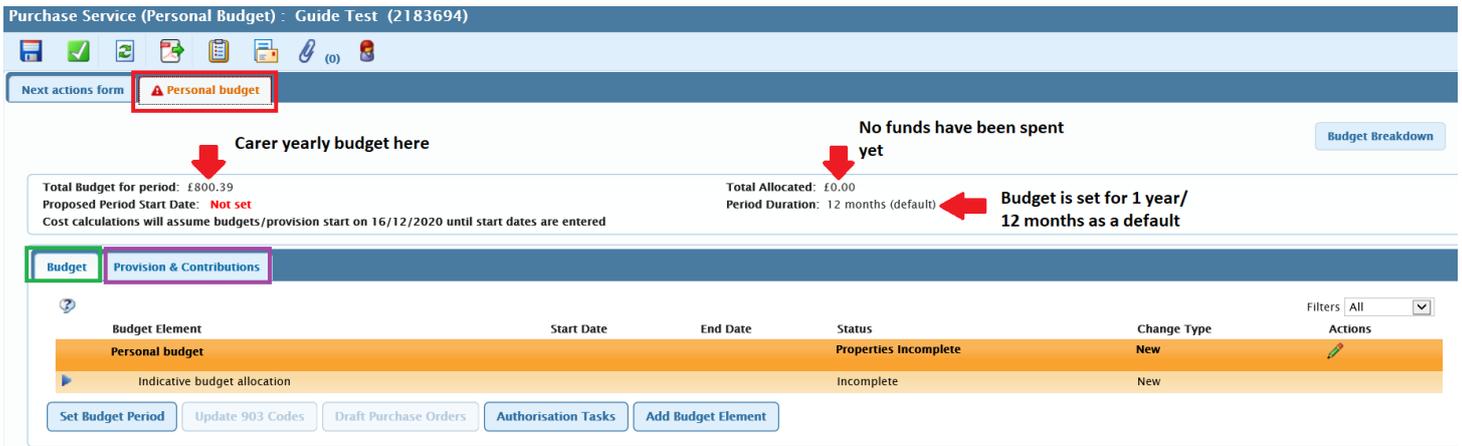
Next actions

Next action	Assigned to	Reason	Note	Priority	Status

Add

Section completed

- When you open the 'Personal budget' tab you will see the following. Take some time to familiarise yourself with this page:

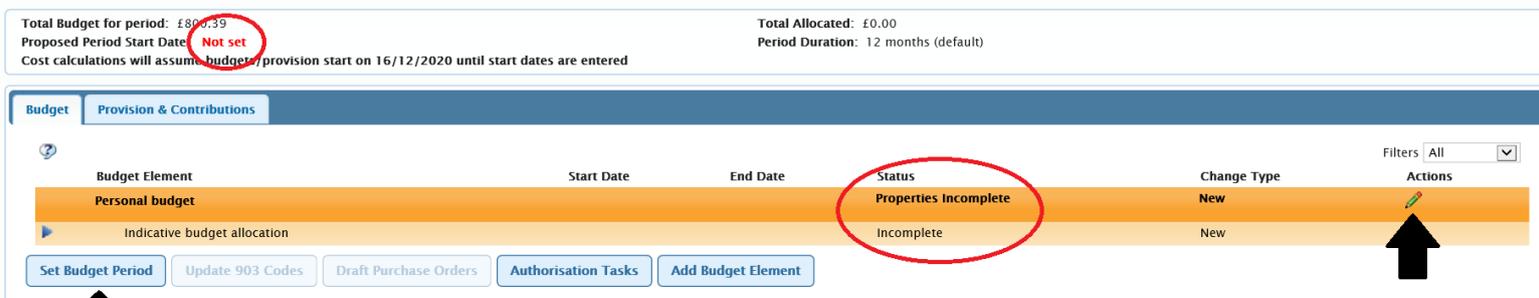


- The **Total budget for period** is the Carer yearly budget. This is the amount of money generated from your Carer Conversation, pulling through to this step. In this example, it's £800.
- Note there are two tabs: The **Budget** tab (circled in green) is the tab showing at the moment, and the **Provisions and Contributions** tab (circled in purple). The Budget tab is where you will amend/add anything to do with the budget. The Provisions and Contributions tab is where all services are added- and in this case, where the Carer payment will be added.

**Provide the missing information required under the Budget tab**

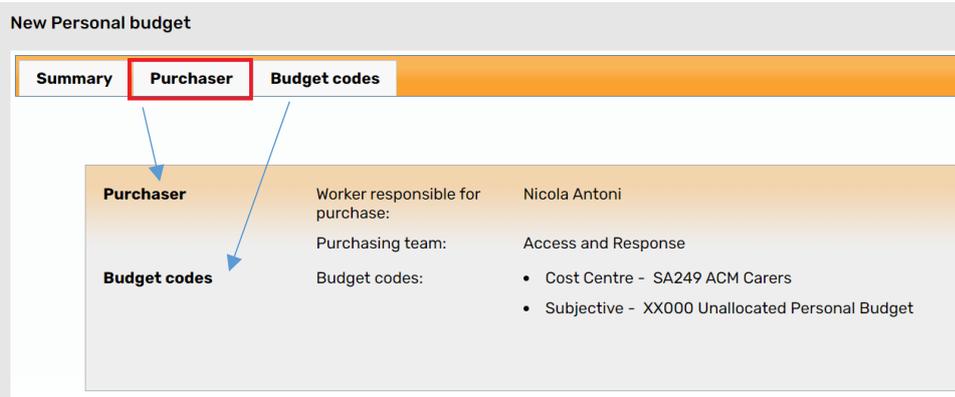
**Please note**, you only need complete the following actions in relation to the budget, if the Carer has not received a carer budget before.

If they have received a budget before, then this will run year after year, and will likely be available here already. No budget actions are required, and you can therefore skip this part (proceed to Page 4 of this guide).



- There are two issues you need to resolve here: one is to set the *Period Start Date* and the other is *Properties Incomplete*.

- Set the **Proposed Period Start Date**, which currently states 'Not set'. Click 'Set Budget Period' (black arrow indicates this above)  
Enter the date you want this budget to start from (leaving the period duration as '12'), before selecting 'Save'.
- Next, provide the missing information required under **Properties Incomplete**, using the pencil icon (black arrow indicates this above).  
**(Please note, if it doesn't say 'Properties Incomplete' then you don't need to amend anything, and you can move onto the next step, Page 4 of this guide).**
- Click the red warning note '**review and amend**', which will bring you to a page with three tabs.



New Personal budget

Summary Purchaser Budget codes

**Purchaser**

Worker responsible for purchase: Nicola Antoni

Purchasing team: Access and Response

**Budget codes**

Budget codes:

- Cost Centre - SA249 ACM Carers
- Subjective - XX000 Unallocated Personal Budget

- Under the *Purchaser* tab: Your team may have pulled through under Purchasing team, but please ensure it's the correct one. If not, select 'Find' and enter your team.
  - For instance, if you are in a neighbourhood team, and ASC Neighbourhood Team North has pulled through under 'Purchasing team' for example, this will need to be changed to **ASC Neighbourhoods**. This applies to any neighbourhood team.
  - If you are in the CYPDS team, you will need to change your Children's team (CSSW Young People with Disability Transitions Team 14-25 for example), to **CLDS Integrated Team – CYPDS** instead.
- Once a team has been entered, automatically the Carer budget code will appear, under the *Budget Codes* tab. You don't need to do anything further with this tab. (If the Carer budget code is not appearing, then please ensure you have added the 'Carer' service user group on the individual's front screen and that it is set as the primary group.)
- **Select 'OK'**, and you'll note on this page that the red warning with 'review and amend' has now gone as this has been completed.  
**Select 'OK'** again to bring you back to the main page.

- The 'Properties Incomplete' status has been changed to 'Proposed', and we have now sorted everything we need to under the **Budget** tab:

Total Budget for period: £800.39  
 Proposed Period Start Date: 16/12/2020  
 Cost calculations will assume budgets/provision start on 16/12/2020 until start dates are entered

Total Allocated: £0.00  
 Period Duration: 12 months

**Budget date now set**

Budget Element	Start Date	End Date	Status	Change Type	Filters	Actions
Personal budget			Proposed	New	All	
Indicative budget allocation	16/12/2020		Proposed	New		

No longer says 'Properties Incomplete'

## Add the Direct Payment provision under the Provision and Contributions tab

To provide a Carer with their budget/funds, we purchase this via a Direct Payment. We therefore need to add a Direct Payment provision.

- To add a Direct Payment provision, we need to select the **Provisions and Contributions** tab. If any services/ funds have ever been provided to this Carer, past or present, they will be listed here.
- To add a provision, simply select '**Add Provision**':

Total Budget for period: £800.39  
 Proposed Period Start Date: 16/12/2020  
 Cost calculations will assume budgets/provision start on 16/12/2020 until start dates are entered

Total Allocated: £0.00  
 Period Duration: 12 months

budget breakdown

Service/Element	Element Type	Start Date	End Date	Status	Change Type	Sort By	Filters	Actions
						Service	All	

Add Provision

- Choose 'Direct Payment' from the Service Group list, and then choose one of the two options that open up under *Service*:

**Add Service – Choose Service Type**

Service Group (select first)

- Customer contributions
- Day services
- Direct payments**
- Floating Support
- On-going Services Homecare
- Other
- Residential respite
- Shared Lives
- Sheltered housing
- Supported living

Service

- DP Card Scheme
- LBC Direct Payment Scheme

- If you have decided that the Carer will receive a one-off payment for the year, then choose **LBC Direct Payment Scheme**.  
If the Carer is to receive an ongoing budget over the year, through monthly payments on a prepaid Card, then choose **DP Card Scheme**.  
Once you've selected an option, **click 'OK'**.

### Ongoing Carer payment: If you choose DP Card Scheme option

- Fill in the relevant information, in relation to the DP you're setting up under the following tabs:

New DP Card Scheme > Change Standard Settings for Service

Summary	Dates	Purchaser	Provision	Allocated Party	Budget Codes	Outcomes
Decision date:	Start date:					
	Planned end date:					
Purchaser	Worker responsible for purchase:	Nicola Antoni				
	Purchasing team:					
Provision	Supplier:	Allpay Limited				
Allocated Party	Allocated person:					
	Allocated organisation:					
Budget Codes	Budget Codes:	Cost Centre - Subjective -				
Outcomes	Desired Outcomes:					

- Dates:** Put the start date of the Direct Payment in, as agreed with PSIC. Do not put an end date in if this is an ongoing Direct Payment.
- Purchaser:** This is you the practitioner, so under 'Purchasing Team', ensure the correct team is detailed.
- Allocated party:** This is the person managing the Direct Payment card, so in this case the Carer themselves. Under 'Person', select 'Find' and find the Carer's name to add here. Ignore 'Organisation' - this is not required.
- Budget Codes:** The Carer budget code should automatically appear.

### One-off Carer payment: If you choose the LBC Direct Payment Scheme option

- Fill in the relevant information, in relation to the DP you're setting up under the following tabs:

New LBC Direct Payment Scheme > Change Standard Settings for Service

Summary	Dates	Purchaser	Provision	Allocated Party	Budget Codes	Outcomes
Decision date:	Start date:					
	Planned end date:					
Purchaser	Worker responsible for purchase:	Nicola Antoni				
	Purchasing team:					
Provision	Supplier:	LBC Direct Payments Scheme				
Allocated Party	Allocated person:					
	Allocated organisation:					
Budget Codes	Budget Codes:	Cost Centre - Subjective -				
Outcomes	Desired Outcomes:					

- Dates:** Put the start date of the Direct Payment in. As this is a one-off, this can be today's date. You can also choose to put the same date in as the end date if you wish or leave the end date blank.
- Purchaser:** This is you the practitioner, so under 'Purchasing Team', ensure the correct team is detailed.
- Allocated party:** This is the Carer receiving the funds. Under 'Person', select 'Find' and find the Carer's name to add here. Ignore 'Organisation' - this is not required.
- Budget Codes:** The Carer budget code should automatically appear.

- The other tabs do not require your attention- the Provision tab has already selected the supplier of Allpay (this is the provider for the prepaid card). The Outcomes tab is optional.
- Your page should now look like the following:

New DP Card Scheme > Change Standard Settings for Service

Summary	Dates	Purchaser	Provision	Allocated Party	Budget Codes	Outcomes
<b>Decision date:</b>	Start date:	16/12/2020				
	Planned end date:					
<b>Purchaser</b>	Worker responsible for purchase:	Nicola Antoni				
	Purchasing team:	Access and Response				
<b>Provision</b>	Supplier:	Allpay Limited				
<b>Allocated party</b>	Allocated person:	Guide Test				
	Allocated organisation:					
<b>Budget codes</b>	Budget codes:	Cost Centre - SA249 ACM Carers Subjective -				
<b>Outcomes</b>	Desired outcomes:					

- Then select 'OK'.

- The other tabs do not require your attention- the Provision tab has already selected the supplier of LBC Direct Payments Scheme. The Outcomes tab is optional.
- Your page should now look like the following:

New LBC Direct Payments Scheme > Change Standard Settings for Service

Summary	Dates	Purchaser	Provision	Allocated Party	Budget Codes	Outcomes
<b>Decision date:</b>	Start date:	16/12/2020				
	Planned end date:					
<b>Purchaser</b>	Worker responsible for purchase:	Nicola Antoni				
	Purchasing team:	Access and Response				
<b>Provision</b>	Supplier:	LBC Direct Payments Scheme				
<b>Allocated party</b>	Allocated person:	Guide Test				
	Allocated organisation:					
<b>Budget codes</b>	Budget codes:	Cost Centre - SA249 ACM Carers Subjective -				
<b>Outcomes</b>	Desired outcomes:					

- Then select 'OK'.

**Add an element (add a cost/funds) to this Direct Payment.**

- You will have noticed we have not yet stated how much this Direct Payment will be a week/ how much the Carer will be receiving. To do this, we select 'Add Element':

Service Group: Direct payments Service: DP Card Scheme

Desired Outcomes:

Note:

Elements in this Service	Start Date	End Date	Status	Change Type	Actions
<a href="#">Change Standard Settings</a> <a href="#">Add Element</a>					

- Initially, one-off options are visible, however if you click on the *Show element types in this category* drop down, you can see more options.

**Add an element (add a cost/funds) to this Direct Payment.**

- You will have noticed we have not yet stated how much this Direct Payment will be/ how much the Carer will be receiving. To do this, we select 'Add Element':

Service Group: Direct payments Service: LBC Direct Payments Scheme

Desired Outcomes:

Note:

Elements in this Service	Start Date	End Date	Status	Change Type	Actions
<a href="#">Change Standard Settings</a> <a href="#">Add Element</a>					

- The one-off options (which you need) should be visible as a default, in the *Show element types in this category* drop down.

- For an ongoing Carer Direct Payment, you want to select **DP Card- Ongoing**:

New DP Card Scheme > New Element

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Filter the element types list by category

Show element types in this category DP Card - One off  
DP Card - Ongoing  
Information  
Other contributions 

Show all element types

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Element Type

DP - Standard Rate - Card  
DP - Agency Rate - Card  
DP - Variable Rate - Card  
Day Services - Card  
Residential respite - Card  
Transport - Card  
Carer - Card (Weekly)   
Other - Card

- Choose the **Carer – Care (Weekly)** element type, and then select **'Next'**.

You are now in the element, and can see that there is missing information (the cost), under the 'Delivery' tab.

New DP Card Scheme > New Carer - Card (Weekly)

Summary	Dates	Purchaser	Provision	Allocated Party	Delivery	Budget Codes	Note	Payments
<b>Dates</b>	Start date:	16/12/2020	Planned end date:					
<b>Purchaser</b>	Worker responsible for purchase:	Nicola Antoni	Purchasing team:	Access and Response				
<b>Provision</b>	Supplier:	Allpay Limited						
<b>Allocated Party</b>	Allocated person:	Guide Test	Allocated organisation:					
<b>Delivery</b>	Frequency:	Weekly	Standard total cost:	£0.00	Overridden total cost:	<b>REQUIRED</b> 		
<b>Budget Codes</b>	Budget Codes:	Cost Centre SA249 ACM Carers Subjective JH030 Direct Payments						
<b>Payments</b>	Method of payment:	Via Corporate System	Payee:	Supplier				

New LBC Direct Payments Scheme > New Element

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Filter the element types list by category

Show element types in this category DP - One off 

Show all element types

---

Element Type

DP - Standard Rate (one off)  
DP - Agency Rate (one off)  
DP - Variable Rate (one off)  
Day Services (one off)  
Residential respite (one off)  
Transport (one off)  
Carer (one off)   
Other (one off)

- Choose the **Carer (one off)** element type, and then select **'Next'**.

You are now in the element, and can see that there is missing information (the cost), under the 'Delivery' tab.

New LBC Direct Payments Scheme > New Carer (one off)

Summary	Dates	Purchaser	Provision	Allocated Party	Delivery	Budget Codes	Note	Payments
<b>Dates</b>	Start date:	16/12/2020						
<b>Purchaser</b>	Worker responsible for purchase:	Nicola Antoni	Purchasing team:	Access and Response				
<b>Provision</b>	Supplier:	LBC Direct Payments Scheme						
<b>Allocated Party</b>	Allocated person:	Guide Test	Allocated organisation:					
<b>Delivery</b>	Frequency:	Once	Standard total cost:	£0.00	Overridden total cost:	<b>REQUIRED</b> 		
<b>Budget Codes</b>	Budget Codes:	Cost Centre SA249 ACM Carers Subjective JH030 Direct Payments						
<b>Payments</b>	Method of payment:	Via Corporate System	Payee:	Allocated Party				

- Select the 'Delivery' tab, and enter the weekly cost the Carer will be receiving under **Overridden Cost**:

New DP Card Scheme > New Carer - Card (Weekly)

Summary | Dates | Purchaser | Provision | Allocated Party | **Delivery** | Budget Codes | Note | Payments

Fields marked with a \* are required before the service can be purchased.

Frequency \*

Standard Cost

Overridden Cost  

If the Carer has a yearly budget of £800 for instance, divide this by 52 (weeks of the year), and you will have the accurate weekly payment (£15.38 in this case).  
The funds will be provided to the Carer monthly via their prepaid card, but are always calculated on the system as weekly.

- Once you have added in the cost information under the 'Delivery' tab, then **select 'OK'** which will bring you back to the main element page.

- Select the 'Delivery' tab, and enter the one-off cost the Carer will be receiving under **Overridden Cost**:

New LBC Direct Payments Scheme > New Carer (one off)

Summary | Dates | Purchaser | Provision | Allocated Party | **Delivery** | Budget Codes | Note | Payments

Fields marked with a \* are required before the service can be purchased.

Frequency \*

Standard Cost

Overridden Cost  

- Once you have added in the cost information under the 'Delivery' tab, then **select 'OK'** which will bring you back to the main element page.

You can see your element has now been added and displays the cost that you've entered.  
If you need to amend this use the pencil icon, or to delete it use the 'x' icon.

Service Group: Direct payments Service: DP Card Scheme

Desired Outcomes:

Note:

Elements in this Service	Start Date	End Date	Status	Change Type	Actions
Carer - Card (Weekly)	16/12/2020		New		 
Average Per Week: £15.38					

- **Select 'OK'** to return to the main page.

You can see your element has now been added and displays the cost that you've entered.  
If you need to amend this use the pencil icon, or to delete it use the 'x' icon.

Service Group: Direct payments Service: LBC Direct Payments Scheme

Desired Outcomes:

Note:

Elements in this Service	Start Date	End Date	Status	Change Type	Actions
Carer (one off)	16/12/2020	16/12/2020	New		 
Cost (One-off): £800.00					

- **Select 'OK'** to return to the main page.

- The Direct Payment provision you have added (the orange line) and the element you added to that (the white line underneath) is now showing. If you do not see both of these lines of information, then you know this has not been added correctly:

Total Budget for period: £800.39  
 Proposed Period Start Date: 16/12/2020  
 Cost calculations will assume budgets/provision start on 16/12/2020 until start dates are entered

Total Allocated: £800.00  
 Period Duration: 12 months

The payment you have now added for the Carer to receive

The provision you have added

The element you added to the provision

Amend this by using the pencil icon. The paper/red 'x' icon here is to cancel the DP you have just added entirely.

Service/Element	Element Type	Start Date	End Date	Status	Change Type
LBC Direct Payments Scheme				Proposed	New
Carer (one off)	P	16/12/2020	16/12/2020		New

## Sending an Authorisation Task to your manager

- Select the **Authorisation Tasks** button to send a request to your manager for authorisation. If this button is greyed out/ unavailable, then it means there is an existing current budget that was agreed previously, and an authorisation in this step is not required:

Total Budget for period: £800.39  
 Proposed Period Start Date: 16/12/2020  
 Cost calculations will assume budgets/provision start on 16/12/2020 until start dates are entered

Total Allocated: £800.00  
 Period Duration: 12 months

**Authorisation Tasks**

Service/Element	Element Type	Start Date	End Date	Status	Change Type
LBC Direct Payments Scheme				Proposed	New
Carer (one off)	P	16/12/2020	16/12/2020		New

- Ensure you click on 'Personal budget authorisation- TM authorisation for level 7', to enable the managers drop-down list to appear. Choose your manager and select 'Add'. Note, we always use 'Pass to worker' NOT 'Pass to team'.

Authorisation: Personal budget authorisation - TM authorisation for level 7

Pass to team or:

Pass to worker:

Request Notes:

Existing Authorisations:

Package: Authorisation

Status: Last updated: Last updated by:

Shabnam Ahmed [7]  
 Imran Ali [7]  
 Teresa Chan [7]  
 Kim Christodoulou [7]  
 Matthew Conaghan [7]  
 Linda Dakare [7]  
 Bill Davis [7]  
 Anna Derham [7]  
 Saniya Drummond [7]  
 Charles Edozien [7]  
 Chris Essel [7]  
 Karl Gill [7]  
 Victoria Grimwood [7]  
 Carol Hawthorne [7]  
 Sheena Henderson [7]  
 Asli Ipek [7]  
 Amanda Jackson [7]  
 Mehret Kidane [7]  
 David Kinloch [7]  
 Jessica Lawson [7]  
 Christel Linden [7]  
 Chris McGuinness [7]  
 Virtual Manager North [7]  
 Lucinda Okadigbo [7]  
 Eni Salawu [7]  
 Hayley Schofield [7]  
 Jamie Spencer [7]  
 Daniel Turner [7]  
 Virtual Cap Panel [8]

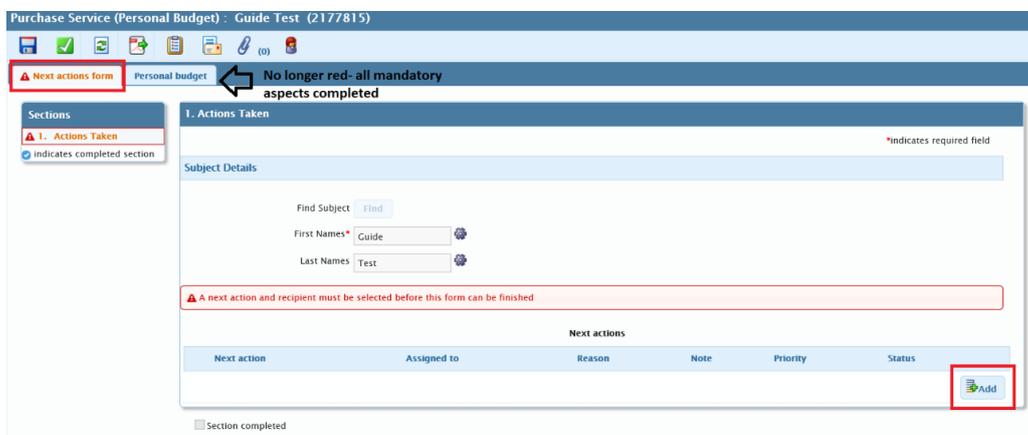
Add Clear

Done

- Once added, select 'Done'.
- You now must 'Save and close' this workflow step, until your manager has authorised.

## Selecting a next action, and finishing this step

- Once your manager has authorised the task, you need to 'Resume' the Purchase Service (Personal Budget) workflow step.
- On the 'Next action form' tab, select **Add**:



- You will see two drop-down options available. To complete this step and ensure the Direct Payment is set up/ the Carer receives their funds, select **Purchasing Outcome**.

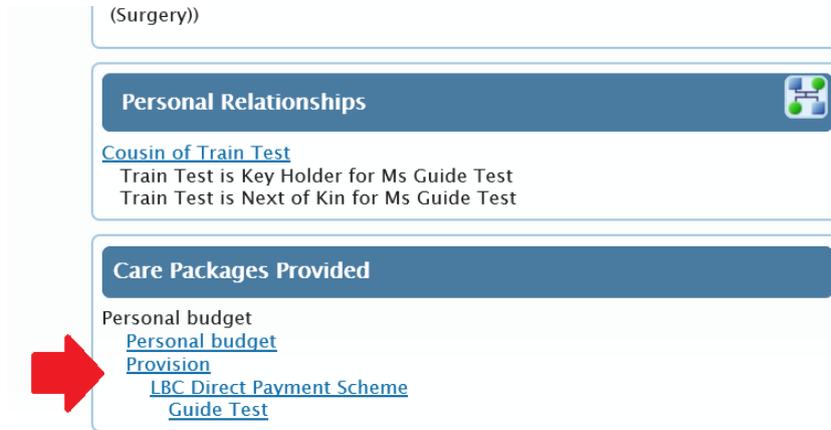
To abandon this step, as if you never created it (if opened in error for instance), choose **Abandoned Purchase**:



- Then 'Add and Close'
- Finally, you must **FINISH** this workflow step, using the green tick icon in the toolbar. Without finishing this step, the Direct Payment will not be in place.



- Once the finish icon has been selected, the step will generate a Purchase Order (PO). It's not necessary for you to keep this or send it to anyone.
- On the individual's front screen, you can now see the Direct Payment in place:



(Surgery))

**Personal Relationships**

[Cousin of Train Test](#)  
Train Test is Key Holder for Ms Guide Test  
Train Test is Next of Kin for Ms Guide Test

**Care Packages Provided**

Personal budget  
[Personal budget Provision](#)  
[LBC Direct Payment Scheme Guide Test](#)

- For one-off Carer payments, it's advisable for you to also email the Direct Payment team to inform them that you have added this Carer Direct Payment onto the system, so they can contact the Carer directly to make the payment as soon as possible.