FLOWCHART FOR NEW PERSONAL BUDGET SET UP

Case for Personal Budget discussed by Assessment and Review Team

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Meeting/discussion about the needs of the child and appropriate services

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Provision package/s agreed and budget costed out – type of budget confirmed, i.e.

1. Total budget held by parent/carer
2. Budget split between parent/carer and LA
3. Payments made solely by LA to providers

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Budget amount agreed and signed off by Kate Symes/Andrew Briggs

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Service/s to be commissioned approached and the following checked and confirmed in each case:

- Check if the vendor is on SAP.
- If not, their details should be obtained and recorded on Form PB1, including £10m Public Liability Insurance and DBS clearance - obtain paperwork evidence, then complete the online HMRC IR35 check.
- Complete the online Vendor Request Form, attaching the paperwork as above – they will then be set up and a notification is sent to the requester with the new vendor number.

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If budget is Type 1 or 2:

- PB Agreement to be signed by family and LA
- Bank details form completed by parent/carer
- Bank details sent to Payments Team for setting up

If budget is Type 3, no further paperwork is required.

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EHCP is amended to reflect details of the Personal Budget

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PB information is added to EMS