

Appendix 2: Following a What Matters Conversation - Support Budget Process Map - Macro

Lead Practitioner determines if the individual eligible for a managed care and support plan and agrees the well-being outcomes required

Lead Practitioner ascertains how much responsibility choice and control the individual wants over their care and support planning and delivery?

Minimum – Identify and explain the Local Authority managed processes

Considerable involvement but support required for some or all of the processes – identify and explain the 3rd party managed processes and provide information about 3rd party support brokers

Total control but may need some specialist advice regarding e.g. payroll – Identify and describe self-managed budget processes

Lead Practitioner and Individual agree the type of budget and Lead Practitioner explains roles and responsibilities in more detail.

Lead Practitioner applies the Resource Allocation System and acquires authorisation of the indicative budget

Lead Practitioner informs the service user what the annual amount to support them is likely to be (the indicative budget) and

Financial assessment undertaken and individual informed of their contribution

Lead Practitioner co-produces the Care and Support Plan with the individual

3rd Party options discussed with individual and agreement between the LA and the 3rd party support broker formalised

Individual designs the Care and

3rd Party support broker co-produces the Care and Support Plan with the individual or carer

Lead Practitioner submits Care and Support Plan for final approval – Are the planned activities legal? Will they come within indicative budget? Will they meet the individuals’ agreed outcomes?

Information for performance measures recorded

**Care brokers make arrangements with care and support provider in the specific geographical patch.
Provider Contract**

**3rd party support broker makes arrangements for care and support on behalf of the individual
Brokerage Contract**

**Citizen Contract issued.
Individual utilises the budget as per
Care and Support Plan**

Managed Care and Support plan delivered

Budget regularly monitored

**Reviewing Officers undertake review of managed care and support plan
Eligibility re-confirmed (resource wheel applied)**

**Lead Practitioner undertakes review of care and support plan
Eligibility re-confirmed (resource wheel applied)**

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Eligibility re-confirmed (resource wheel applied)**

If needs/risks/outcomes have changed, or concerns have been raised, reassessment required

Eligibility re-confirmed (resource wheel applied)

If level of choice and control required has changed or the RAS has changed, process begins again