

# Self-directed support

## Money: finding out how much you will get

This fact sheet tells you about self-assessment and resource allocation. You start by filling out a form – often called a ‘self-assessment form’.



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## The basic facts

One of the important features of self-directed support is that people should be able to find out quickly how much money they will have for support.

People can only be in control of their support if they know how much money they are entitled to.

Anyone who already runs their own home knows it would be impossible to buy or rent somewhere to live, buy furniture, do the shopping or go on holiday if they didn't know how much they have to spend.

It's the same for self-directed support.

Local authorities should have a resource allocation system – a clear, open and fair way of deciding money for support.

## More information about self-assessment and resource allocation

You need to find out how much money you are entitled to.

**To do this you fill out a form about:**

- you
- your life
- the support you need.

In Control recommends that people fill out this assessment on their own if they can and if they want to. So, In Control talks about 'self-assessment'.

But each local authority does things a bit differently. Some local authorities talk about 'self-assessment' and some don't. However, every local authority should have a way of finding out about you, your life and the support you need, so they can make a fair allocation of money.

In this factsheet, we talk about a self-assessment form, but this may be called something different where you live.

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# More detail

## The self-assessment form

### The form:

- should be practical and easy to answer. One of the important things about self-directed support is that the rules and information must be clear and easy to understand
- must take the needs of the person and their family into account. It is like a combination of a Carers' and Community Care Assessment, but is easier to fill out
- should make clear what outcomes the local authority expects you to achieve if you have the right support
- should tell you if you are entitled to other kinds of funding (such as the independent living fund)
- should trigger a benefit check, so you can make sure you are getting everything you are entitled to.

Each question in the self-assessment form has a number of points attached to it. You add up the points and the total number of points gives you an amount of money.

This is an 'indicative amount' – it gives you a figure to go on while you make a support plan. The actual amount you get in the end may be different.

## The process

This varies from place to place, but it should be something like this:

- You can fill the form in yourself or with help from a family member, social worker or care manager, for example. Some local authorities may insist that you fill in the form with a care manager or social worker.
- When you get a self-assessment form, the local authority should tell you about any charging system they have. 'Charging' means getting the person to pay for some or all of their support.



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- When you have filled in the form, you should know the 'indicative amount'. This is the rough figure to work on when you go to the next step, making your support plan. If your local authority uses a self-assessment process where you work out the indicative amount, you must check with a care manager or social worker that you have got this right.
- When you've made your support plan, you need to meet with a care manager or social worker. If they agree your plan, you get a firm amount. This is called your personal budget.

### The local authority should also tell you:

- how long the money will be available to you
- what the money can and can't be spent on
- how they will give you the money. Is it weekly, monthly or quarterly?
- what guidance and support they can give about managing the money.

### The questions on the self-assessment form

#### The self-assessment questionnaire usually has these areas of questions:

- meeting personal care needs – looking after yourself: for example, eating, washing, dressing, shopping
- relationships – family, friends, people you know
- being part of the community – for example, using local shops, the library, clubs, community centre, church or other place of worship, helping neighbours, being involved in local organisations
- work, leisure and learning – having a job, learning new things and enjoying life
- making decisions – who decides important things like where you live, who supports you, who looks after your money
- staying safe from harm – for example, when you're going out on a bus, using a gas cooker, or going down stairs
- complex needs and risks – can your behaviour be dangerous for you or other people?
- family carer – if someone in your family supports you, what effect does supporting you have on them?

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## Other assessments

Some people also need to do other assessments, for example, for the Independent Living Fund or occupational therapy.

## Disagreements about the assessment

If you don't agree with the resource allocation, you are entitled to a re-assessment. Speak to your social worker or care manager. If you feel you can't speak to them, you can ring up your local social work centre and request a complaints form.

# Some examples

## Julia Winter

'It starts off with a self-assessment which is a question and answer form, asking questions like do you live with anyone else or do you live alone?

The people that you live with: are they able to give you lots of support or not very much support and then more of the kind of medical questions about what help you need with washing, dressing, that kind of thing.'

## Caroline Tomlinson, Joseph's mother

'What we have done is go through a self-assessment process. That is where you are given a questionnaire that is very much like a magazine type of questionnaire where you fill in the questions and you are awarded points for answers.

We went through that process. It only took a few minutes to really identify Joseph's needs. After we had completed that, the social worker added up the points. Each point is worth so many pounds and we were told this is how much money you are entitled to.

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So in our situation we looked at how much money we were entitled to and we did have further debate and discussion about whether we believed that amount would actually meet Joseph's needs. So you don't have to take that as the firm bottom line answer.

There is a challenge process if you think that it isn't appropriate and you think you can clearly demonstrate that the money wouldn't actually meet the person's needs. We used the support plan to demonstrate clearly how much we needed to keep Joseph healthy, safe and well.'

## Gavin Croft

Under the self-directed support system you complete the simple questionnaire. It's just tick boxes really. It focuses more on the effects your disability has on your life – so how can you live your life, still live your life with a disability, how can we help you to do that?'

## Cindy Peacock

'I have got a visual impairment. I am actually registered as blind. When I was on direct payments, all I knew was that I was getting 25 hours a week. I did not know how much money it was costing or anything else but on individual budgets, they tell me exactly what the cash equivalent is so I know how much money I have a year and I know what I can do with that money – I can spend it how I please as long as it meets all my needs.'

## George Doubleday

'Some mathematical equation was done and it equalled my original budget. But I knew roughly how much it was going to be. I got an answer quite quickly so I did my plan around that amount of money.'

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There is a lot of information about self-directed support on In Control's website:  
[www.in-control.org.uk](http://www.in-control.org.uk)

Free to download from  
[www.in-control.org.uk/entitlementslibrary](http://www.in-control.org.uk/entitlementslibrary)

Example self-assessment questionnaires – look for:

0091\_Self\_AssessQuestion\_1.doc

0092\_SAO\_1\_Scoresheet.doc

0093\_Self\_Assess\_Quest\_2.doc

0094\_SAO\_2\_Scoresheet.doc

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 Wythall, B47 6JX or [www.in-control.org.uk/shop](http://www.in-control.org.uk/shop):

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#### About the In Control and Me project

A three-year project to produce accessible information for everyone who wants to direct their own support, funded by the National Lottery through the BIG Lottery Fund. You can find out more at [www.mencap.org.uk/incontrol](http://www.mencap.org.uk/incontrol) or [www.in-control.org.uk/icandme](http://www.in-control.org.uk/icandme)