

The Care Management and Individual Budget Processes

The following 4 pages explain the two processes.



This is how the care management process usually works

- 1.** Someone needs support. The person is referred to Social Services.
- 2.** A care manager arranges an assessment.
- 3.** The care manager fills out a care plan.
- 4.** A budget holder or panel agrees the care plan and commissions / arranges a service.
- 5.** The person gets their service.
- 6.** The care manager reviews the service – checks how things are working - after 6 weeks.

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How the Individual Budget Process will work

- 1.** The person does their own self-assessment - or contacts a care manager for an assessment.
- 2.** The care manager says how much money they are eligible to in order to meet their needs. This money is the person's Individual Budget. The care manager also says how the person can get support to plan - if they want it. The care manager says what makes a good plan – the criteria. If the person needs an agent, this is agreed.
- 3.** The person works out their support plan - with help if they need it.
- 4.** The care manager checks and signs off the support plan if it is a good plan.
- 5.** The person gets their Individual Budget and organises their support. If the person wants someone else to organise it for them, a family member might help. But they could also ask a support broker, a trust, a support provider that would hold their Budget as an Individual Service Fund, or the care manager.
- 6.** The person and the care manager review the plan, perhaps after a year.

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