

Financial Assessments & Direct Payments Newsletter

Welcome to the Financial Assessment and Direct Payment Team Newsletter!

This newsletter has been created for all customers receiving home care, direct payments, respite or residential care or attending a day centre.

If you are a direct payment user you will be used to receiving a newsletter from us every few months. This month your newsletter is being combined with the annual financial assessment newsletter.

Who are the Financial Assessment and Direct Payments Teams and what do they do?

The Financial Assessment and Direct Payment Teams are made up of 12 members of staff (see photos over the page).

Both teams are part of Merton's Community and Housing department. The Financial Assessment Team's main function is to calculate how much customers can afford to pay towards their community care services. All staff are trained visiting officers, so while they are in your home they will make sure you have enough money to live on and are receiving all the welfare benefits you are entitled to. You can find more information

about welfare benefits later on in the newsletter.

The Direct Payment Team is here to help you find services suitable for your needs. Instead of social services buying the services you need, the team can give you the money directly for you to spend the money on meeting your needs. This gives you more choice and independence.

Contacting Us

You can contact us through any of the following methods:

Telephone 

You can call us Monday to Friday between 9am-5pm on 020 8545 3632, or our individual numbers are on the next page

Email: 

You can email the Financial Assessment team on financial.assessment@merton.gov.uk
You can email the Direct Payments Team on directpaymentsduty@merton.gov.uk

www.merton.gov.uk



The Government Standard



Meet the Team

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Self-Directed Support and Personal Budgets

Self-directed support is a new way of delivering social care, developed by the Government. Their aim is for every social services user to know how much money they are entitled to receive to meet their needs, and to be able to choose their own services if they wish.



Self-Directed Support (via Personal Budgets) in Merton Update

On 30th May, Merton began Phase One of the Self Directed Support (SDS) delivery process. This has involved 35 customers testing the tools and processes of self directed support. This has enabled customers in phase one to start to have more choice and control over the services and support they receive.

Eventually all adults receiving a Social Care service in Merton will go through the self directed support process and will have the

option of receiving their social care funding as a personal budget where they will be able to commission their own services. By October 2010, Merton will ensure that all new service users eligible for social care will be offered a personal budget. By April 2011, Merton will have to ensure that at least 30% of eligible service users have a personal budget.

Progress so far...

To date, 20 people across social care (including young people in transition, people with a learning disability, older people, people with a mental health issue) have received an indicative allocation. This means they have been told how much money social services will spend on them to meet their needs. 15 people are now going through the support-planning phase, and 5 people have already received a personal budget. Some people have chosen to have a direct payment, and some have chosen to have their services directly provided for them by social services.

For more information on Self Directed Support, please contact Heather Begg (Project Lead) on 0208 545 4515, heather.begg@merton.gov.uk

Fairer Contributions Policy

We contacted you in October and again in December last year about a new charging policy, called the Fairer Contributions Policy. We set out some changes to the charging policy we were proposing to make and held several consultation meetings to explain the proposals. We then asked you to send us your views on the proposals.

Thank you to all of you who told us your views. This was really helpful. However, we only had a return rate of 10% so Cabinet Members have decided that they need more time for consultation before any decisions can be made. This means that for the time being the current charging policy we already have in place will continue.

More consultation may therefore be taking place, which we will contact you about separately.

More information about this consultation, including a full summary of results, can be found on our website www.merton.gov.uk/financialassessment

Automatic Reassessments

From April 2010 the Financial Assessment Team are introducing a new system to make the process of annual reassessments easier for customers.

Every year we reassess all 2500 customers. We used to do this every April in line with the change in the financial year. In 2008 we introduced a new system of reassessing all non-residential clients in their month of birth, meaning we could stagger reassessments through the year, and could visit more people.

While this process was effective, we have now invested in a new system that will automatically reassess most customers every April. This will be more convenient for you, and will make better use of staff resources so more time can be spent out in the community.

- Most people will now receive a letter from us in April explaining what their new assessment is
- If any information on the letter is wrong, just get in touch with us- full details will be provided in the letter
- We will still need to contact some customers to request information

Are you getting all the money you're entitled to?

The Department for Work and Pensions estimate that billions of pounds worth of welfare benefits go unclaimed every year. This means that even where people are entitled to receive welfare benefits, they are not claiming them.

The Financial Assessment Team members are all welfare benefit trained and can make claims for you when completing your financial assessment.

Benefits you could be entitled to:

- **Pension Credit:**

Made up of two elements- guarantee credit and savings credit. You may be entitled to receive one or both of these. You must be 60+ to qualify. Guarantee credit is paid to ensure pensioners have a certain level of income to live on. Savings credit is paid to people with money in the bank to reward them for saving.

- **Attendance Allowance**

This is paid to people over 65 who need help with personal care, to help them meet the costs of care.

- **Disability Living Allowance (DLA)**

DLA is made up of two parts. The care component is paid to people under 65 who need help with personal care, to help them meet the costs of care. The mobility component is paid to those who have difficulties with mobility. Claimants may qualify for one or both elements.

These are just some of the benefits you could be entitled to. Your entitlement will depend on your individual circumstances. If you have any questions, or would like further information about whether you could be eligible, contact the Financial Assessment Team directly on 020 8545 3076 or financial.assessment@merton.gov.uk.

There is also a Welfare Benefits Team in the council, who are dedicated to helping all Merton residents apply for all kinds of welfare benefits. More information can be found about this www.merton.gov.uk/living/benefits/benefitsadvice or phone 020 8545 4178.

Wherever you seek advice on claiming for welfare benefits you shouldn't have to pay for advice or for someone to make a claim for you. Beware of external agencies who charge for giving advice and making benefit claims.

Free Personal Care at Home

You might have heard in the news recently the Government has proposed to give the most critically ill people free personal care in their homes. The Department of Health are consulting on this at the moment, and if the proposals go through this is due to start from 1st October 2010.

At this stage the plans are still in consultation and nothing has been decided. When any arrangements are confirmed we will keep you updated.

If you would like any further information on the Government's proposals please go to www.services.parliament.uk/bills/2009-10/personalcareathome

CM2000

CM2000 is a system used by Merton to record the times worked when a carer is in your house. The carer will use your phone to dial into the computer system to record their start and finish times. Here are some of the great benefits of using this system:

- We can check you are receiving the right level of care you need to meet your needs, which is very important to us
- This system records exact start and finish times of your carer, meaning your bills will be more accurate
- The phone call is totally free, it won't cost you a penny

Good customer service and high care standards are important to us, and this system helps us meet those. If you are not already using CM2000 but would like to, please contact 020 8545 4363.

Proposed Charges for 2010/11

It is proposed that there will be no increase in charges from April 2010. Therefore the charges would remain at:

Homecare (full charge)	£16.32
Day Centre (full charge)	£6.85
Day Centre (with transport)	£9.49
Hot Meals	£3.43
Frozen Meals	£3.17

These do not apply to direct payment customers.

Your Invoices

Direct Debit

The Accounts Receivable Team would like to let you know that you can pay both your homecare and residential care invoices by direct debit.

What are the benefits?

When you pay by direct debit, payments are made automatically from your bank, ensuring bills are never forgotten. This will save you time and help make it easier for you to pay.

Our promises to you

We will send you an advance notice of each payment and tell you how much the charge will be.

You will have the right to cancel at any time, with an immediate money back guarantee from your bank in the unlikely event of an error.

If you would like to arrange to pay by direct debit, please call Marva Andall on 020 8545 4776 or Estell Richards on 020 8545 4771.

You said.....We did

The Financial Assessments and Direct Payments Teams believe that by taking on board customer's feedback we can improve our feedback and make our service to you the best it can be.

In the past year, this is some of the feedback we have had and what we have done about it:

"I'd rather have a visit from someone to help me complete the financial assessment forms than do them by myself"

The Financial Assessment Team recently changed their processes so that service users coming through reablement are automatically given an appointment to have someone come and complete their forms. In the past visits have always just been booked on the request of the service user. This means people see a friendly face before receiving the forms, which we know can be daunting at first.

"My finances don't change very much every year, do I have to give you my details that often?"

We have to reassess all service users every year for the contribution to care services but we understand most customer's income doesn't change that much every year. From April 2010 for

most service users we will be up rating their details in line with the Department for Work and Pensions, and asking you to contact us if any of the figures are different. This means that most customers won't have to send us information every year. There will be some customers that will still need to give us updated information every year, depending on your circumstances. There is more information about this earlier in the newsletter.

"You assessed me at full cost as I didn't return the form in time, but I was having trouble filling it out."

From 2009 the Financial Assessment Team changed the full costing policy to make it fairer to service users. When an assessment form is sent out, a member of the team will phone the customer a week later to check the form has been received and if any help is needed. If the form hasn't been returned a week after this, the team will make another phone call to check the progress. This means fewer people are assessed to pay the full cost of services before any information is received.

"I'm on direct payments but I'm confused about the monitoring"

We have recently produced *A Guide to Direct Payments Finance and Monitoring*. More information can be found about this later in the newsletter.

Our Service to You

Performance

In order to deliver the best possible service to customers, we have developed a Customer Charter. This outlines exactly the service customers can expect from the Financial Assessment and Direct Payment Teams, and includes things such as:

- To answer your phone calls within five rings
- To complete financial assessments within five days of receiving all information
- To contact customers to arrange a visit within 24 hours of receiving a referral

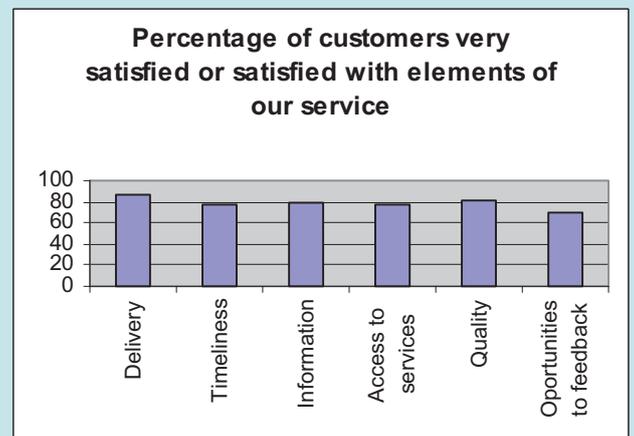
Financial Assessments and Direct Payments Team Performance April – December 2009

- 90% of new assessments carried out within 5 days
- 98% of new direct payment users signed up within target
- 88% of visits booked on target
- 99% of phone calls answered on target
- £4674 worth of benefit applications carried out

Survey Results

Last year, we sent you a questionnaire asking for your feedback on how satisfied you are on each element of our service.

Here is a summary of our results, further information can be found on our website www.merton.gov.uk. We have used your comments from the survey to improve our service to you, such as the actions listed in the 'You said-we did' section of this newsletter.



Complaints

Between April and December 2009, the Financial Assessments and Direct Payment Team received a total of 8 complaints. These were mainly around the assessment calculation. The average response time to respond to these was 5 days.

We asked people who have made a complaint to tell us how we dealt with it, and if we could improve anything:

- 70% found it very easy or easy to make a complaint
- 100% found the response quick enough
- 100% felt the response fully or mostly answered the complaint
- 100% are very or quite satisfied that the complaint was dealt with professionally and appropriately

Benchmarking

Every year the Financial Assessment Team take part in a benchmarking exercise, comparing our performance with various other local authorities.

This year we were compared with 60 other local authorities across the country. Categories under review include:

- Workloads
- Value for Money
- Performance Measures
- Charging Policy

As a team, we performed very well. Our cost per assessment is below average, which means we provide value for money. Our turnaround times for carrying out financial assessments for new customers were among the best compared to the other authorities.

A summary of the full CIPFA Benchmarking report is available on our website
www.merton.gov.uk/financialassessment

Charity Cake Sale



In January the Financial Assessment and Direct Payments Team held a staff cake sale, tombola and auction. This was to raise funds for Chase Hospice for children and St Raphael's Hospice.

We raised a total of £1344.20 for these two fantastic causes.

Thank you to all staff and local businesses that donated great prizes, and to the team for making the delicious cakes and snacks that raised so much money.



Questionnaire winner!

The lucky winner of our annual questionnaire last year was Mrs Gregory from Wimbledon, who won £40 Marks and Spencers vouchers. If you would like to be in with a chance of winning in this years prize draw, please complete the questionnaire attached with this newsletter.

Finance and Monitoring for Direct Payment Users

The following does not apply to you if you are not receiving direct payments.

If you are a direct payment user, you will be receiving money payments every month for you to purchase your own care. We have to monitor this money to make sure your needs are being met and the money is being spent appropriately.

From April 2010 we will be introducing a new monitoring procedure. This is because with the introduction of personal budgets, we are expecting there to be an increase in the number of people receiving direct payments and so we will need to change the system to cope with increased demand.

Summary of Changes

- Finance officer decides how often you should submit monitoring information
- This could still be monthly, six monthly or yearly
- You should still keep your own records
- We will contact you if anything is going to change for you

At the moment we ask all direct payment users to send us monitoring information every month. Under the new procedures, the finance officer will decide how often you need to provide us with monitoring information. Some people will still need to send us information every month, but some people may need to start sending us

information less frequently, such as every 6 months. This will depend on things such as how much money we pay you, your support network and how well you have kept your records in the past.

We will be contacting you directly if anything is going to change for you. Full details of this new process can be found on our website in April www.merton.gov.uk/directpayments

Finance and Monitoring Guide

We have recently produced a new booklet- *A Guide to Direct Payments Finance and Monitoring*. This is to answer frequently asked questions many direct payment users have when dealing with the finance side of direct payments. A copy of the guide will be sent out to all direct payment users, and will be available to read on our website

www.merton.gov.uk/directpayments

Finance Surgery

We are still holding the finance surgery on the first Tuesday of every month. If you are struggling with your monitoring forms why not make an appointment to meet with our finance officer? The next surgery will be 2nd March. To make an appointment please phone 020 8545 3632.

Online monitoring

Did you know you can submit your monitoring information online?

Just go to

www.merton.gov.uk/directpayments

Direct Payment Forum

Direct Payment Forums are now being held four times a year. The next meetings are:

10th May 1pm to 3pm
2nd August 11am to 1pm
1st November 1pm to 3pm

All direct payment users and anyone interested in having direct payments are welcome to attend the forum. This is an ideal opportunity to share experiences and network with other people on direct payments.

All forums will be held at All Saints Day Centre, All Saints Road, South Wimbledon. If you would like to attend please contact us on 020 8545 3632.

Minutes of all previous forums can be found at www.merton.gov.uk/directpayments

If you recently received a direct payment contract in the post, it is important you send this back to us as soon as you can. If you have any questions about this please contact us on 020 8545 3632.

If you are not currently using direct payments but are interested in finding out more, please contact us. We can arrange for someone to come and talk to you to see if direct payments might be for you. Call us on 8545 3632.

Personal Assistants and Carers Needed!

The Direct Payments Team are working hard to find Personal Assistants (PA's) for a number of new and current direct payment users. These service users are looking for reliable and recommended Personal Assistants to work within their homes.

This is where you come in. A large number of Personal Assistants are working for you (direct payment users) right now but may only be with you for a few hours per week. Why not ask them if they are looking for some extra hours? If they are, ask them to contact the Direct Payments team. They will of course continue to work with you but they can also help others in their free time and earn some extra cash.

If your PA works with you full time, you may still be able to help. Does your PA know other PA's looking for work?

Lets help each other by making more people aware of Direct Payments today. Your recommendations and referrals of new PA's will be truly appreciated by your fellow direct payment users and the Direct Payments team.

Please contact the Direct Payments Team for more information on 020 8545 3925.

Your Shout!

In every direct payment newsletter we try to bring you a story featuring a direct payment user. This issue, Kat Majique has written us an article detailing how direct payments have helped him live a more independent life. Thanks Kat for sharing your story with us!

“Hi there. Kat Majique here. A little about myself: I am 36 years old and a writer, singer songwriter and musician.

Creativity is a feature of my particular bi-polarity. It was due to this bi-polarity that I came under the care of the Wimbledon Community Mental Health Team in the summer of 2008. I am still under the care of this team in 2010 yet a very different person now to how I was back then. This is due in large part to the direct payments scheme and how it has helped and is continuing to help me in realising some of my musical dreams.

“I am still under the care of the mental health team but as a very different person now to how I once was. This is due in large part to the direct payment scheme.”

I had previously worked in the field of mental health and while doing so had been involved with the Battersea based arts mental health charity Sound Minds. Before receiving direct payments myself, therefore, I had witnessed



first hand how they could therapeutically assist individuals by involving them in such noble pursuits as music, literature, drama, filmmaking and the fine arts.

I have now been in receipt of direct payments for over a year. I am currently recording an album of songs at Crown Lane Studios in Morden and the new lease of life and sense of self-esteem shines right through for all to see. As well as being therapeutic and providing a sense of both vocation and purpose, it is also the first and most important practical step in turning the ambition into a potential profession.

When asked therefore, by the department, to write a few words about how direct payments have helped me and positively affected my life I felt both happy and duty bound to do so. Here's hoping that for all of your readers for whom it is applicable, direct payments may be as equally rewarding a financial assistance as has been for me.”

If you would like to appear on the Your Shout pages in the next issue contact Amy Bannister on 8545 3610.