

Personal Budgets

Customer Contributions and Planned Short Breaks

Where you require planned short breaks, the personal budget for this service is annualised. You can generally take planned short breaks as and when you need them, in line with the number of nights/costs agreed within your support plan. To comply with benefit legislation, your planned short break allowance is over a rolling 12 month period. Planned short breaks cannot exceed 28 consecutive nights, and no more than 56 nights within a rolling 12 months. Breaks taken that exceed 56 nights in a rolling 12 month period will be charged as temporary residential care stays, which have different charging rules. If a single short break does exceed 28 consecutive nights in duration then you must inform the DWP if you are in receipt of benefits, and the excess nights will be charged as a temporary residential stay.

If your support plan is just for planned short breaks, you will be assessed under non-residential charging rules to see whether you can contribute towards the cost of this service.

All personal budgets are reconciled annually, and where actual care costs are lower than planned, and lower than charged contributions, a credit will be applied to the personal account. Where costs are greater than planned, and the maximum assessed contribution has not been paid, then the additional costs up to the maximum assessed contribution will be charged.



Example 1, Elodie

Elodie lives alone. Elodie has asked for support to help her get dressed and manage her shopping as her mobility is poor following an accident.

Elodie's support is expected to cost £90 per week or £4680 per year.

Elodie has been assessed as being able to contribute £105 per week (£5460 per year) Elodie will be charged £90 a week which reflects the cost of her care. After a year, Elodie's care account is checked. The actual cost of her care was £5150. As Elodie was assessed as being able to contribute more towards her care, she will be charged £470 to cover the extra care she had, on her next invoice.

A change is now made to Elodie's care package and her expected cost is £5150 a year (£99.04 a week). At the end of the second year, the actual care cost was £5000, meaning that Elodie will receive a £150 credit on her care account, which will be offset against her next invoice.



Example 2, Usma

Usma lives with her son Iqbal who provides most of her care. To enable Iqbal to have a break from his caring responsibilities, it is agreed that Usma can have 56 nights of residential short breaks each year. Usma decides to take these a week at a time throughout the year.

The planned cost of Usma's care package is £5200 per year or £100 per week.

Usma has had a financial assessment and is able to contribute £65.00 each week (£3380 per year) towards her care. Usma will be charged her full contribution each month towards her care. If, at the end of the first year, Usma has not taken all of her care, then she may be entitled to a refund of her contribution. This would only happen if the care she had taken cost less than the contribution she had paid.



Example 3, Clive

Clive has complex care needs. His support plan details that the expected cost of his care is £62400 per year. Clive's support is broken down as follows;

2 days per week at Day Care £160 per week/ £8320 per year

7 hours per week 1-1 support £140 per week/ £7280 per year

35 hours per week PA support £400 per week/ £20800 per year

56 night short breaks at Beautiful View £465 per night/ £3250 per week/
£26000 per year (Clive usually has 28 nights at the start of the summer, and then 2 x 2 weeks when his PA is on holiday)

Clive has had a financial assessment and is able to contribute £120 a week (£6240 per year) towards the cost of his care. Due to unforeseen circumstances Clive is unable to receive his day support, 1 - 1 support, and his PA cannot provide care. Clive still has support services costing £26000 a year and will continue to contribute each month to the cost of his remaining service. For Clive to receive a reduction or refund of contribution already paid, the support he receives must cost less than what he has contributed.

