

DIRECT PAYMENT CHECKLIST

This is a list of the areas that you need to consider when you have a Direct Payment for services, particularly if you will be employing your own Personal Assistant.

Remember that the DASL Direct Payment team is here to assist with advice and practical support in all areas if you need any guidance.

BACKGROUND and SETTING UP

- Do I have a copy of my care plan and know what services I am going to receive via a Direct Payment – for example, how many hours I have been allocated and does this include weekends?
- Do I understand the principles of receiving a Direct Payment and have the basic information available, for example, rates of pay, monitoring responsibilities for social services?
- Do I know how to contact DASL Direct Payment Team for information and advice and how to contact my social worker/care co-ordinator?
- Have I had an initial visit and received a DASL information pack on Direct Payments?
- Have I opened a separate Bank Account with a chequebook facility solely for the use of the Direct Payment money? Does my social worker/care-co-ordinator have the bank account number and bank sort code?
- Have I signed a contract with Social Services for Direct Payments?

KNOWLEDGE

- I am aware of my responsibility to have Employer's Liability Insurance.
- I am aware of my responsibilities to the Inland Revenue as an employer.
- I have information about Payroll services for paying tax and national insurance or have contacted the Inland Revenue if I am going to do this myself.
- I have timesheets and understand how to record the number of hours my Personal Assistant works.
- I understand my responsibilities for monitoring and the information Social Services needs in this respect and where and how often this needs to be sent.
- I know what information I need to have to ensure my Personal Assistant is able to work legally in this country.

RECRUITMENT

- Do I need to recruit or is there someone I know who would be able to work as my Personal Assistant? Only in exceptional circumstances can this be some one who lives in the same household as you, i.e. partner/parent. You will have to discuss this with your social worker/care-co-ordinator.
- Have I decided where I want to advertise the position of Personal Assistant?
- Have I considered the type of person that I want to employ?
- Have I written an advert that contains all the relevant information about the job?
- Do I have a written job description and person specification?

- Does the application form contain questions about the things I need to know?
- Have I services in place from social services whilst I undertake the recruitment? (The process can take at least 6 weeks)
- Have I considered the types of questions I will ask in the interviews?
- Do I know where I will hold the interviews and any support I will need from family/friends and/or DASL Direct Payments Team?

EMPLOYING MY PERSONAL ASSISTANT

- Have I received back the references from the past employers of my Personal Assistant?
- Have Social Services carried out a CRB (police check) if I am employing someone to look after my child?
- Do my Personal Assistant and I have a copy each of a signed contract of employment?
- Is my Personal Assistant clear as to when they are to start work, what hours they are working and how much they are going to be paid?
- Is my Personal Assistant aware of the types of duties they will be expected to undertake?
- Is my Personal Assistant willing to comply to the need of informing me if they earn over £100 per week in total so tax and national insurance deductions can be made?
- Have I made arrangements, either through a payroll company or am I ready myself to ensure that tax and national insurance contributions are made?
- Do I have Employer's Liability Insurance in place?
- Do I have timesheets ready?
- Do I understand about paid annual leave and how much time my Personal Assistant is allowed to take off from work.

- Do I have a plan in place if my Personal Assistant is unable to come to work? Do I know how and where to get help if this situation arises?
- Will I need some additional support with monitoring, completing timesheets, making tax and national insurance contributions? Do I know how to get this support from DASL?