

How to submit a referral online

Referrals only need to be made if the customer is new to a Direct Payment and will be using a PA or if the customer already receives a Direct Payment but is unknown to Independent Lives.

If the customer already receives a Direct Payment and is known to Independent Lives, please contact the advice team with your query - advice@independentlives.org

Customers wishing to engage an agency should not be referred to Independent Lives, but to the Wiltshire Adult Care and Support Guide.

Please leave blank any sections that are not relevant, unless they are required fields. Required fields are marked with *(Required)*.

Referral

Choose the DP type. Whether the referral is for care, respite, carers' DP or other.

Choose the most appropriate Reason for Referral. Pop-up explanations are available within the form, but for reference, these are the current options:

- **Early Advice and Guidance** An initial discussion outlining what a Direct Payment involves, the responsibilities of becoming an employer, and the support available to the person.
- **Core Support** The person is new to Direct Payments and requires full start-up support to employ or engage a Personal Assistant (PA).
- **Ongoing Advice and Guidance** For those with an existing Direct Payment in place, who are currently unknown who require ongoing advice or support with employment or recruitment.
- **Self-Funder** The person exceeds the financial threshold for receiving a Direct Payment but has eligible care needs and requires support to employ or engage a PA.
- **Managed Account** The person requires a bank account managed by Independent Lives for their Direct Payment.

Is an Independent Lives managed bank account required? Select whether Independent Lives will be managing the bank account.

Person's Information

Enter the name and details of the individual receiving support, including their LiquidLogic ID. Please note only numbers can be entered in the phone fields.

Managing the Direct Payment

Select who will be responsible for managing the Direct Payment:

- The person receiving care (may have admin support from an appointed nominated person)
- A suitable person (someone legally responsible if the person lacks capacity)

If the customer has capacity to manage the Direct Payment, they can choose to provide details of a nominated person to support them. The customer will remain the employer/engager, but the nominated person will have authorisation to talk to Independent Lives on their behalf.

If the customer lacks capacity to manage the Direct Payment, a suitable person must be named.

Additional contact details will be requested depending on the option chosen.

Communication and Accessibility Needs

If relevant, tick the appropriate boxes and provide further detail in the free-text fields that appear.

Direct Payment details

DP start date. If you have selected core support, ongoing advice and guidance or managed account as the reason for referral, you will be asked to provide the DP start date.

Hours per week. Please provide the agreed number of hours per week. Please note only numbers can be entered in this field.

Hourly funding rate. Please provide the agreed hourly funding rate. Please note only numbers can be entered in this field.

Client Contribution. Select whether the customer is required to pay a contribution. If yes is selected, you will be asked to enter the amount. Please note only numbers can be entered in this field.

Support plan. If a support plan has been created, please select yes and upload it. If no support plan is available, please select no and enter the details of the support required in the box that appears.

Potential issues/ risks for visiting workers. Note any known risks such as hoarding, preferences for male or female workers, history of aggression, etc.

Additional information. If you need to provide any additional information not covered by the above questions, please do so here.

Referrer Details

Provide your name, role, contact details and any other relevant information.

Review the form to ensure all required fields are completed, and relevant documents are attached.

Submit the referral through the online platform.

By completing the form as thoroughly as possible and using the built-in guidance, you will help ensure timely and appropriate support is arranged without the need for follow-up clarification.