

START

Complete a good conversation / followup conversation and discuss direct payment and virtual wallet with client

Ensure you click 'yes' to the RAS indicative calculation

Liaise with family re: care provider and if a personal assistant is required a referral to **Independent Lives** can be made

See Appendix 2 below

Follow normal process for assessment/authorisation

Ensure the Financial Assessment has been completed and the client contribution has been established

Present to Challenge Panel

When funding agreed

Start / update support plan on LAS

As you will not be sending this to brokerage you will use the [service provisioning wizard for direct payments](#)

LAS

Plan (in side bar menu) Click on blue hyperlink **Add service**

This will bring up the purple box (proposed service) double click in the heading and go through the following process

Service type : Direct payment

Service type : Direct payment

Service type. Direct payment virtualwallet ongoing

Defaults to PPL

Enter **start date**

Required units **1**

No proposed schedule required

Frequency **1**

Budget specific funding
Choose appropriate team from drop down list

Main beneficiary **me as a person**

Search : pull in PPL (this is an important step and if not pulled through PPL will not receive the funds for the wallet) Please note you must activate the service so check your task list when this comes in for you to do to ensure the whole LAS process is completed correctly

Overridden unit cost.
Enter indicative budget amount Follow the normal process for support plan and budget authorisation

Complete Referral PPL virtual wallet template on Jira. Provide information on Care Provision (*Mon-Sunday, times and length of calls, Total funded amount, & client contribution, StartDate.*)

At this point

Family to arrange Standing Orders for client contribution

When it's set up

PPL will send access to Client/Representative managing the account, and show the client or client rep how to access requests, payment of invoices, set up care.

Please note, if a Direct Payment needs to be cancelled please email pre-paidcards@croydon.gov.uk with all the details.

This will go to the Provider payments team



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Add service

This will bring up the purple box (proposed service)
double click in the heading and go through the following
process

Service type : Direct payment

Service type : Direct payment

Enter **start date**

Service type. Direct payment virtualwallet ongoing

Required units **1**

Defaults to PCG

LAS

No proposed schedule required

Frequency 1

Budget specific funding
Choose appropriate team from drop down list

Main beneficiary **me as a person**

Search : pull in PCG (this is an important step and if not pulled through PCG will not receive the funds for the wallet) Please note you must activate the service so check your task list when this comes in for you to do to ensure the whole LAS process is completed correctly

Overridden unit cost.
Enter indicative budget amount Follow the normal process for support plan and budget authorisation

At this point

Family to arrange Standing Orders for client contribution

When it's set up

PCG will send access to Client/Representative managing the account, and show the client or client rep how to access requests, payment of invoices, set up care.

