

A guide to Virtual Wallet for Social Workers

This guide will cover the following: (click the item to go straight to it)

1. [10 things to know about Direct Payments and Virtual Wallet in Croydon](#)
2. [Croydon Internal Process - steps to complete as part of a referral](#)
3. [An overview of what parts of the process is covered by Croydon Council and Public Partnerships](#) (also referred to the VW support team) within this document.
4. [How to send a referral to Independent Lives if a PA is being used to provide any of the support](#)
5. [How to send a referral to PPL using Jira](#)
6. [Checklist for Social Workers](#)
7. [What happens next](#)
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Ten Things to Know About Direct Payments and Virtual Wallet in Croydon

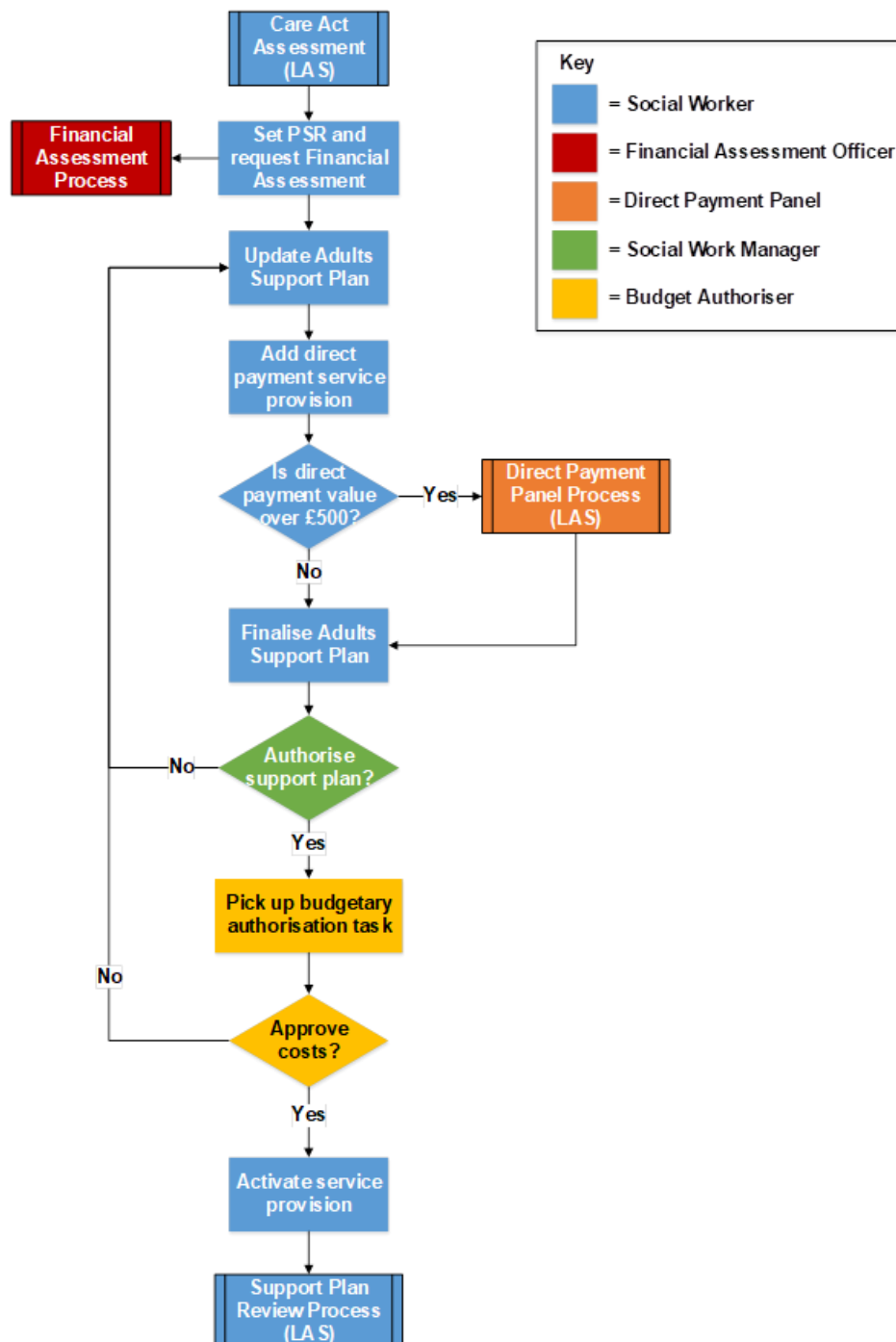
1. **Direct payments are...** given by the council to individuals in need of support so they can **arrange and pay for their own care**, rather than having social care services directly provided for them.
2. **They are good because...** they give individuals **greater control** over their lives and how their care is delivered, promoting independence, choice and inclusion.
3. **Direct payments aren't new in Croydon...** previously, there has been a **mix of**: individuals managing direct payments via a separate bank account, via a pre-paid card or the council managing it on the individual's behalf.
4. **This worked well in some cases...** but some of the **challenges** were that individuals weren't as involved as they could be, they weren't as flexible or efficient as they could be and the take-up levels weren't as high as hoped.
5. **Virtual Wallet is...** a tool that individuals access on their phone or computer to manage their direct payment. It takes the **best parts** of direct payments and makes things **easier** for you, the council, the individual and their providers.
6. **The plan in Croydon is...** that Virtual Wallet is the **preferred** way of meeting the care needs of anyone where a traditional care package isn't the best way to support them. We will also be **migrating** all existing pre-paid cards and council-managed direct payments to Virtual Wallet.
7. **The process in Croydon is...** the care management team discuss Virtual Wallet with the individual, and **if they want to proceed**, the team member makes a referral to the Virtual Wallet team at PPL via the **Jira** system to get it set up.
8. **There is lots of further information available about Virtual Wallet...** the website www.myvirtualwallet.co.uk/croydon includes a short **video** and **tutorial** about it.
9. **Staff need to...** be familiar with Virtual Wallet and be able to **explain and promote** it to individuals. A good starting point is the website mentioned above. There is also lots of information on the council's **Intranet** site.
10. **The key messages to individuals are...**
 - Direct payments work really well for lots of individuals. Virtual Wallet doesn't change any of this, it just makes it easier.
 - Virtual Wallet can be used to arrange care from an agency or a micro-enterprise or to manage a personal assistant.
 - The individual can nominate a family member or friend to help them manage their Virtual Wallet if they want.
 - It's not as scary as it sounds, and there is lots of help and support available.

Croydon Internal Process – steps to complete as part of a referral

The new *Direct Payments Pack for ASC* and the *Direct Payment LAS Guidebook* details the process.

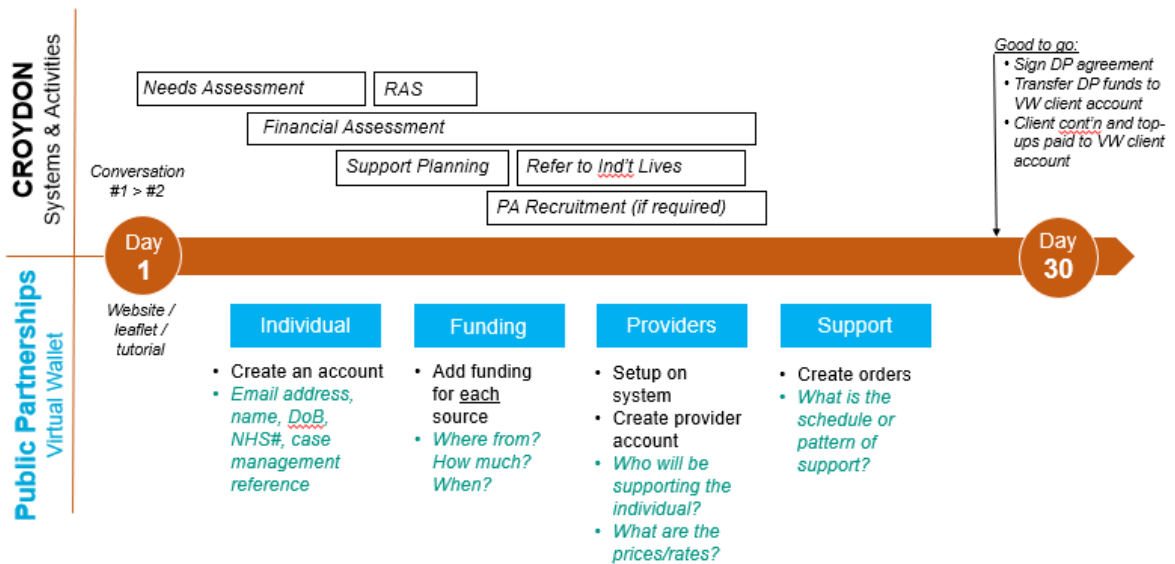
It follows the normal assessment process (including support plan and financial assessment), but instead of sending it to brokerage there is an option to select a Direct Payment and PPL Virtual Wallet.

To 'activate service provision', the social worker needs to make a referral to Virtual Wallet.



An overview of what parts of the process is covered by Croydon Council and Public Partnerships

Setup / New Referrals / Croydon



How to send a referral to Independent Lives

If the client you are referring is supported by a PA, whether that be they are currently sourcing one or already have one in place, it is important that a referral is made to Independent Lives.

If the client does not currently have a PA

IL can assist the user/employer to find & recruit a PA and also support them with the legalities of being an employer, ensuring they have sufficient insurance and contracts in place.

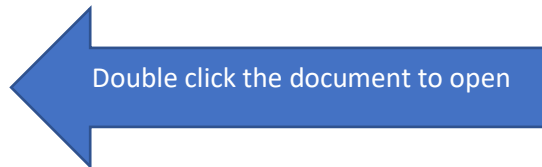
If the client already has a PA or one in mind

IL can check over and if relevant, make contact with the client/employer to ensure they have everything covered

To make a referral to Independent Lives, please complete the referral form below and email this to Advice@independentlives.org and a member of the team will action accordingly.



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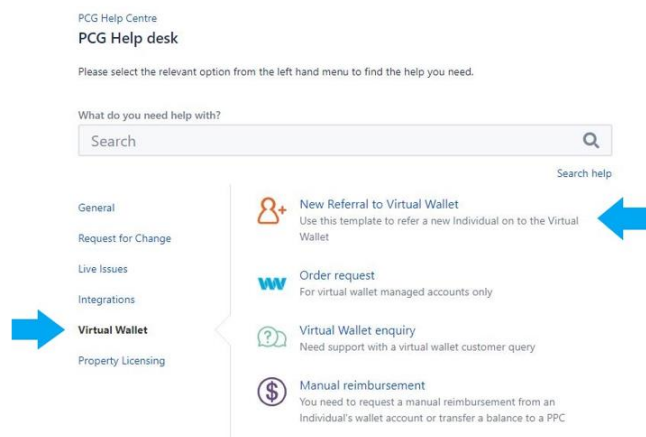


How to send a new Virtual Wallet referral to PPL using Jira

Before you can refer an individual to the Virtual Wallet, you must have a user account set up on the PPL Help desk called Jira.

It is a good idea to save this link as a bookmark Purley for your information.

Send an email to info@myvirtualwallet.co.uk and we will create your account. This will send an automated email to you to complete the setup (create your own password). **Please keep these login details safe for future.**



Please ensure you select the options on the screens above, this is the two menu options you need to select to refer a client to the Virtual Wallet

OR....

[Click Here for a direct link to the referral](#)

Please ensure you have the following information to hand:

- Client Name, LAS Reference, Address
- Details of any family member or Authorised person on the account
- Start Date of the Virtual Wallet
- Details of the funding (DP, Client contribution/Top up)
- Provider/PA details (if you have them)
- If you have referred to IL to help recruit a PA, please let us know
- Package details (how many hours at what cost)

Checklist for Social Workers

Final Checklist – Please ensure you have completed ALL actions

<i>Task to be Completed</i>	<i>Completed</i>
Client is aware of the Virtual Wallet and that the VW support team will be making contact (use 10 things)	✓
Client is fully aware of any financial contributions they will need to make towards the cost of their care (if this is in dispute, please let us know and keep us informed on the progress of this)	✓
LAS updated to reflect the use of Virtual Wallet (so instead of sending it to brokerage, use the option to select a Direct Payment and 'PPL Virtual Wallet')	✓
LAS updated to redirect the funds to PPL (Delays in funds coming across to us can delay the VW start date)	✓
Referral made to Independent Lives if the client uses or will be using a PA (A referral should still be made if the PA is already employed as they will do a quick 'check-in' to ensure the employer is happy with everything and has everything in place that is required.	✓
Jira referral completed with all requested details to allow the VW Support Team at PPL to work on getting this live	✓

What happens next?

On receipt of the Jira referral, the VW support team will get to work by actioning as follows:

- Create the individual's account on Virtual Wallet
- Create the account for the Authorised Rep (if relevant)
- Make contact with the client/auth rep welcoming them to Virtual Wallet and if a Client Contribution has been identified, provide bank details for this to be paid into, along with the reference number to apply
- Upload the funding breakdown into the client's Virtual Wallet account so this is visible on the 'Account Summary' page when they log in
- Make contact with the PA(s) and/or Provider(s) welcoming them to Virtual Wallet and including a link to register with us
- Once registered we will work to set them up giving them access to either confirm orders (if provider) or submit timesheets (if PA)
- If a provider, we will generate the orders as per the breakdown received in the Jira referral or provided by the provider
- Once funding is received from Croydon Council, this is uploaded virtually to the client's Virtual Wallet account
- Login details and guidance sent to all parties - Account is Live!

*If we need a to clarify anything on the Jira referral or we have any questions regarding the referral to help us complete all of the above setup, we will notify you via the Jira referral, we kindly ask that you respond at your earliest convenience to avoid any delays.

FAQ's

How do I arrange for the funds to go to PPL for Virtual Wallet?

The new Direct Payments Pack for ASC and the Direct Payment LAS Guidebook details the process.

It follows the normal assessment process (including support plan and financial assessment), but instead of sending it to brokerage there is an option to select a Direct Payment and PPL Virtual Wallet.

To 'activate service provision', the social worker needs to make a referral to Virtual Wallet.

I have logged into Jira but I am just seeing a blue and white screen?

We sometimes find users reporting this. If this happens, please open Google Chrome and paste the link into there.

How do I change or reset my Jira password?

Your username is your email address however if you forget your password, please use the 'Can't access your account?' link on the login page, enter your username and an email will be sent to you with the details to access your account again

Can I add any attachments to the Jira referral?

Absolutely! If you have a copy of the Financial Assessment, or anything else you feel is relevant, please upload this to the referral at the bottom of the form or you can go into the ticket once raised and upload this as a comment on the ticket created.

What if something changes in the early stages (cc contribution for example) or I want to provide more information?

Please notify the VW support team asap with details via the initial Jira referral ticket

How long does it take for the VW Support Team to set up the new Virtual Wallet?

This is more based on the quality of information provided at the referral stage. If we have everything we need, we will start making contact with the family and any PA's and/or providers straight away. As soon as they are onboarded and we have the funds, we will put the account live

How do I reply to a Jira comment?

Within the email notification, it will show the Jira reference number and this will be a hyperlink, meaning you can click on the link and (once logged in), it will take you straight to that ticket - you can add a comment at the bottom. Please do not reply to the emails or raise a new ticket as this causes complication and all of the information needs to be kept within the one referral.