**DIRECT PAYMENT**

**REVIEW**

**Children & Young People’s Disability Team**

At every Care Plan/My Plan Review, the Finance & Support Checklist should also be completed. Two weeks before the Review, social worker requests from the Admin Manager (finance) an up-to-date Finance & Support Checklist.

Admin Manager (finance) will establish the current bank balance and write this into the Finance & Support Checklist. Admin Manager completes all sections with exception of 4 and 6

During the Review, the social worker should satisfy themselves that the Direct Payment is meeting the assessed need (eg if it is not being used, it is not working). At the Review, the social worker addresses any issues noted on the checklist.

The Service Review will record that the Finance & Support Checklist was completed, any issues identified and the Finance & Support Checklist will be saved in Caredocs by the person undertaking the Review.

The CiN Review/My Plan will record how the Direct Payment is meeting the need or if it is not, eg not using it, how long this has been and what alternatives have been explored.

Social worker to contact the Admin Manager (finance) to establish if the account holds a surplus that is in excess of 20%. If the account does, they instruct the Admin Manager (finance) to take steps to recover the surplus money.