

Adult Social Care and Health Directorate

Wellbeing Charge Practice Guidance (Extra care settings)

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Version Control	Summary change	Date
8	<p>Wellbeing Charge updated in line with rates payable and charges levied for Adult Social Care services week beginning 10 April 2023.</p> <p>In the interim, reference to “ARMS” function in sections 11.5 to 11.6 and 12.4 replaced with the “Area Adult Social Care Referral Service in line with Adult Social Care and Health (ASCH) new locality working from 3 April 2023.</p>	10 April 2023

Guidance for staff on the Wellbeing Charge

Revised 10 April 2023

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1. Wellbeing Charge Guidance

Following the needs assessment and determination of eligibility, under section 25 of the Care Act, the care and support plan planning process helps decide the best way to meet the person's eligible needs which may mean arranging a care and support package in an extra care housing setting.

The Wellbeing Charge is the cost of the background 24-hour support that is available in the event an emergency that occurs. Everyone who enters an extra care scheme must be advised of the Wellbeing Charge.

The Wellbeing Charge does not form part of someone's care and support package in an extra care housing scheme.

When working out the cost of the care and support, the additional Wellbeing Charge is added to the cost of any hours of regular care and support.

This means the person will only make one financial contribution towards the cost of their care package, which includes their contribution towards the Wellbeing Charge.

This guidance does not apply to learning disability or mental health schemes, but it may be relevant if a person you support has a learning disability and is placed in one of the schemes covered. It relates to the housing schemes set out below:

Housing Scheme	Location	From	Max weekly charge	Contract Name	Element
King Edward Court Emily Court Summer Court Tovil Green Court Bradstow Court Joseph Hadlum Court Buckland Court	Herne Bay Wilmington Hythe Maidstone Broadstairs Ashford Dover	10-04-2023	£18.44	KENT COUNTY COUNCIL - Adult PFI BHAL Support SLA - Kent - 22074	Extra Care – Wellbeing Charge - Weekly
Regis Gate Chamberlain Manor Caesar Court Quarry House Spires Beeches Copperfields Strawberry Hill Bowles Lodge White oak Court	Sittingbourne Ashford Deal Aldington Tenterden Dover Ramsgate Dartford Hawkhurst Swanley	10-04-2023	£18.44	KENT COUNTY COUNCIL - Adult Wellbeing Support SLA - Kent - 46166	Extra Care – Wellbeing Charge - Weekly
Thomas Place	Maidstone	Tenants moved in prior to 16 October 2014 Tenants moved in after 16 October 2014	£14.46 £18.44	KENT COUNTY COUNCIL - Adult TP Wellbeing Support SLA - Kent - 46167	Extra Care – Wellbeing Charge - Weekly

This guidance sets out how tenants in the above schemes are financially assessed for their contribution to the Wellbeing Charge and the cost of their care and support. It also shows how to input services onto Mosaic

2. Information to be given by KCC to an individual interested in moving to one of the above schemes

- 2.1** As soon as possible and before a tenancy agreement is signed, the potential tenant interested in moving into one of the extra care schemes must be informed about all the charges for care including the Wellbeing Charge. There are factsheets available explaining what extra care housing and the wellbeing charge is and can be found on Tri-X.
- 2.2** Appendix 1 contains a standard letter to be used for this purpose. **It is especially important that this letter is updated with the appropriate Wellbeing Charge amount before being sent and a copy kept on the persons record.** Failure to properly inform a person of these charges before they sign up to the scheme may cause problems in the collection of the charges.
- 2.3** You must advise the person that the Wellbeing Charge is subject to KCC annual review of Rates and Charges levied for Adult Social Services. This will mainly impact full cost payers and maximum assessed charge people.
- 2.4** It is the responsibility of Housing Provider to inform prospective residents about the rental and related charges.

3. Entering services on Mosaic and Determining the Cost of Care

- 3.1** All tenants moving to one of the above schemes must have a service input on Mosaic. Please see Appendix 2 in how to set up the wellbeing charge on Mosaic.
- 3.2** There are some new Service Elements set up to account for the different levels of the Wellbeing Charge – you need to ensure that you are careful in selecting the appropriate one for the relevant housing scheme, by referring to the table provided in Section 1 of this guidance.
- 3.3** The cost will default to the maximum contribution, but the cost can be altered if required. This cost should be applied as follows:
 - For Single occupants - the total assessed amount.
 - For two people sharing, the amount is applied as follows:

If only **one** of the two people sharing has the need to be in extra-care housing, then the Wellbeing Charge should be attributed to that person and only this person entered onto Mosaic.

If **both** tenants have a care need, then each person should be entered onto Mosaic, but the Wellbeing Charge entered should be half of the assessed contribution. The Wellbeing Charge is set up with a standard cost attached to it, however that cost is changeable and can be overridden. Purchasing will be able to amend the cost and split between both people.

- 3.4** At least one of the people in the apartment will have a need to be in extra care housing. This does not necessarily mean they have an assessed need for regular care hours. It simply means they have a need to be in the extra care housing scheme with the 24-hour emergency cover which this entails.
- 3.5** If one moves out or dies, the single person left will assume responsibility for the full amount of the Wellbeing Charge. The single person will be required to be set up on the system and be financially assessed to ascertain contribution. If the remaining person is known on the system, they will need to be financially reassessed as they may have had a change in their income (would have been assessed based on the Wellbeing Charge being half of the assessed contribution) and will now need to be assessed as a single person. This will not necessarily mean an increase in their charge, but it may do. Finance will be able to advise on this.
- 3.6** Even people who do not meet the eligibility criteria for care and support under the Care Act 2014 or who do not have any regular care hours, must still be added to Mosaic and the Wellbeing Charge added to their name.
- 3.7** It is now possible to complete the financial assessment on Mosaic without the service being added. Therefore, this must be done as soon as confirmation has been received that a person is taking up a tenancy in one of the schemes. However, it may be possible to inform someone of the maximum they could be asked to pay once the financial assessment has been done on paper. This may help someone decide about whether to enter one of the schemes.

4. Financial Assessment

- 4.1** All people moving into an extra care scheme must have a financial assessment to determine their contribution to the cost of the Wellbeing Charge and their care and support. This applies both to people who meet the eligibility criteria for care and support and to those who do not.
- 4.2** The financial assessment will be conducted by an Assessment Officer within the Client Financial Services Team (CFS). For this to happen, Finance must be sent a notification in Mosaic for the work to commence.
- 4.3** **If possible**, the financial assessment should be conducted before a person moves into one of the apartments so that the correct charge can be applied from day one of their tenancy.

4.4 The financial assessment is conducted in the same way as for other people receiving services in their own home. That is, the cost of the care for charging purposes is compared to 100% of the person's available income and the lower figure charged. For the Extra Care schemes, the cost of the care for charging purposes will always be at least the current cost of the Wellbeing Charge (except for some people sharing an apartment – see Section 3.3). A person we support will only be charged less than this if 100% of their available income is less than the Wellbeing Charge amount.

5. Treatment of Former Homes for Charging Purposes

5.1 Once someone has taken up a tenancy in one of the Extra-Care schemes their former home (if they own it) will be disregarded as capital for 6 months PROVIDED they are taking reasonable steps to sell it.

5.2 The 6 months may be extended in exceptional circumstances but only if they continue to take reasonable steps to sell the property.

5.3 Once the property has been sold, any profit (following deductions for mortgage etc.) will be added to their capital and if this takes them over the capital limit (currently £23,250) they will pay the full cost.

5.4 Taking "reasonable steps" to sell the property basically means putting it on the market at a realistic price that is likely to result in a sale. It could also include preparing the property to be sold (e.g. carrying out essential repairs).

5.5 The above is in line with the rules for claiming Housing Benefit for the rent on the property and Council Tax Benefit. Once the house has been sold, any profit will be taken into account, and it is therefore unlikely that Housing Benefit and Council Tax Benefit will continue in payment.

6. Direct Payments

6.1 If requested, a person can have a Direct Payment for their assessed care needs as long as they want to use a different provider from the normal contracted homecare provider.

6.2 Direct Payments **cannot** be used for the Wellbeing Charge itself.

6.3 If someone wishes to have a Direct Payment, they will be a dual user and paid gross. This means the assessed charge is added to the Direct Payment allocated. Their assessed contribution (towards the cost of their care package and their contribution towards the Wellbeing Charge) is invoiced through Oracle (Kentcare Invoice). This arrangement is known to KCC as "Dual Service Direct Payment"

7. Temporary Absence

- 7.1. The Wellbeing Charge should continue throughout temporary absences. It should only end when the person we support ends their tenancy or dies.
- 7.2 **Practitioners** are responsible for ensuring Mosaic is kept up to date by recording any missed services in any one week. Mosaic will calculate and apply adjustments that are required to ensure the individual is invoiced correctly for services received.

8 When a person dies.

- 8.1 If two people move to an extra care scheme and both have eligible social care needs, the Wellbeing Charge is split equally. If only one person has a social care need, then the person will pay the full Wellbeing Charge. If that person dies, the remaining person (regardless of if they have a social care need) will assume full responsibility for the Wellbeing Charge as per point 3.5
- 8.2 If the person dies and they are the only person in the flat, they will no longer pay the wellbeing charge as explained in the Charging Policy for Home Care and Non-Residential Services.
- 8.3 Following a suitable period, discussions will take place with the next of kin/representative about collecting any outstanding charges.
- 8.4 You need to record that you have had discussions with the person who is going to remain in the property, including dates when the letters were given, or read out and that they understand what is being discussed. Including the actions you have taken to explain about charging. If they refuse to sign the charging letter the financial assessment can still proceed.

9. When a person is funded by Continuing Healthcare (CHC)

A person we support whose care is funded by CHC still needs to be set up on Mosaic and have a financial assessment towards the contribution of the Wellbeing Charge.

10. Out of County Placements

- 10.1 Out of County placements will be required to complete a financial assessment and be set up on the record system.
- 10.2 If the person has been financially assessed as being unable to pay the Wellbeing Charge, the placing authority will be invoiced by KCC to pay for the contribution.

11 Extra Care – Wellbeing Charge Only.

- 11.1 Housing Provider completed professional referral for adult social care on: www.kent.gov.uk/adultreferral
- 11.2 This referral must detail in the “Reason for Referral” whether the person is only requiring Wellbeing Charge only.
- 11.3 If the person appears to have needs and requires a needs assessment or information and advice, this should be clearly noted, and the details of the persons situation should be fully documented in the referral.
- 11.4 The housing provider is responsible for ensuring that the person is aware of the referral and the resulting Wellbeing Charge, this is particularly important if social care support is being sought.
- 11.5 The area Adult Social Care Referral Management Service Admin receive professional referral form and load onto MOSAIC as a contact. The area Adult Social Care Referral Management Service also add a Significant Information on an Open Case (SIOC) and reassign this to Operational Support Service (OSS) with a Note Prefix of: **Extra Care Wellbeing Charge.**
- 11.6 Where there are no requests for a needs Assessment from the housing provider, the area Adult Social Care Referral Management Service Admin can complete and close the contact, No Further Action (NFA) – Notified Operational Team

IF the referral identifies KCC adult social care Involvement is required:

The area Adult Social Care Referral Management Service Admin received professional referral form and load onto MOSAIC as a contact, also progressing the SIOC to OSS as above. Where the professional referral is requesting Social Care assessment, this contact is reassigned to the area Adult Social Care Referral Management Service Screening virtual worker and NOT closed by the area Adult Social Care Referral Management Service Admin.

- 1) The area Adult Social Care Referral Management Service Senior Contact Assessment Officer (SCAO) identifies priority and assigns using MOSAIC to Contact Assessment Officer if there is any request for social care involvement.
- 2) The area Adult Social Care Referral Management Service Contact Assessment Officer completed Contact Assessment/Referral, providing Information and Advice, or identifying onward referral. CAO will verify that the

area Adult Social Care Referral Management Service Admin workflow to OSS is in place.

- 3) OSSA upon receipt of SIOC workflow from the area Adult Social Care Referral Management Service Admin will assign and workflow to the Purchasing Team.
- 4) Purchasing team will add the Service Provision of Wellbeing Charge only onto MOSAIC.

12 Shared Ownership Residents.

12.1. Some schemes in Kent have a mixed tenure, which include shared ownership. These flats do not go through the formal process of nominations and are managed directly by the Housing Provider.

12.2 The Housing Provider will inform prospective residents of the wellbeing charge and will share the Fact Sheet on the Wellbeing Charge and ensure that they sign the wellbeing charge advice letter held by the Housing Provider. This should be kept on their records.

12.3 The same principle applies for shared ownership to rental properties across the county.

12.4 Housing Provider completed professional referral for adult social care on: www.kent.gov.uk/adultreferral

This referral must detail in the “Reason for Referral” whether the person is only requiring wellbeing charge only.

If the individual may benefit from a Social Care assessment or advice and guidance, this should be clearly noted by the referee, and the details of the persons situation should be fully documented in the referral.

The housing provider is responsible for ensuring that the person is aware of the referral and the resulting wellbeing charge, this is particularly important if social care support is being sought.

- 1) The area Adult Social Care Referral Management Service Admin receive professional referral form and load onto MOSAIC as a contact. The area Adult Social Care Referral Management Service Admin also add a SIOC and reassign this to OSS with a Note Prefix of: **Extra Care Wellbeing Charge**

Where there are no requests for Social Care Assessment from the housing provider, the area Adult Social Care Referral Management Service Admin can

complete and close the contact, NFA – Notified Operational Team IF the referral identifies Social Care Involvement is required:

The area Adult Social Care Referral Management Service Admin received professional referral form and load onto MOSAIC as a contact, also progressing the SIOC to OSS as above. Where the professional referral is requesting Social Care assessment, this contact is reassigned to the area Adult Social Care Referral Management Service Screening virtual worker and NOT closed by the area Adult Social Care Referral Management Service Admin.

- 2) The area Adult Social Care Referral Management Service SCAO identifies priority and assigns using MOSAIC to Contact Assessment Officer if there is any request for social care involvement.
- 3) The area Adult Social Care Referral Management Service Contact Assessment Officer completed Contact Assessment/Referral, providing Information and Advice, or identifying onward referral. CAO will verify that the area Adult Social Care Referral Management Service Admin workflow to OSS is in place.
- 4) OSS upon receipt of SIOC workflow from the area Adult Social Care Referral Management Service Admin will assign and workflow to the Purchasing Team.
- 5) Purchasing team will add the Service Provision of Wellbeing Charge only onto MOSAIC.

Appendix 1 (Wellbeing Charge) – Standard letter to Prospective Tenants



Invicta House
Maidstone
Kent ME14 1X
Tel:
Ask for:
Our
Date:

Date:

Information about Kent County Council's Care and Support Charges in Extra Care Schemes

It is important that you read this letter together with the essential information you have received from your potential housing provider about your tenancy.

You should have been told about the rent and service charges you will need to pay for your tenancy and these form part of your contract as a tenant. Some of these charges can be paid by Housing Benefit, but this will depend on your income and capital.

As well as the rent and service charge, Kent County Council (KCC) applies charges for the care and support available in extra care schemes. These charges are set out below:

A Wellbeing Charge – this is a contribution towards the payment made by KCC to the care provider for the 24 hour a day cover they deliver to deal with emergencies.

The 24 hours per day cover is an essential element of extra-care sheltered housing. Whilst a resident may not need to access the help available, the knowledge that there is always support available, will provide reassurance for all tenants.

The Wellbeing charge is currently (**Insert the amount relevant for scheme – refer to Wellbeing Charge Guidance section 1**) per week.

This is means tested and may be reduced following a financial assessment. Payment of this charge is a condition of KCC's care and support arrangements within extra care housing. You will need to pay for this charge during temporary absences, for example hospital stays and holidays.

A Home Care Charge – if you need personal care, a charge is made to pay for any care and support you receive following an assessment of your needs. Again, this charge is means tested and may be reduced following a financial assessment.

You will only have one financial assessment to determine the contribution you can afford towards your care and support and the Wellbeing Charge

Financial assessment for the care and support charges

If you have more than £23,250 in savings and other assets, you will have to pay the full cost of the Wellbeing Charge and your care and support.

However, if you have less than this amount there will be a financial assessment to decide how much you must contribute towards the cost of your care and support.

In some cases, this will work out to be nothing. So that you are fully informed about any possible charges by KCC, a Finance Assessment Officer will contact you to work out what your contribution to the care and support charges will be.

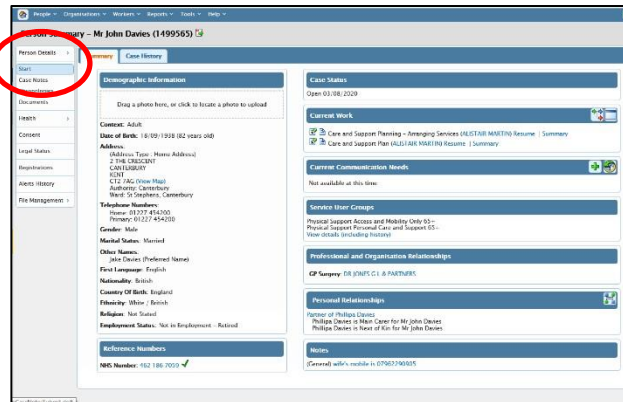
If you would like to discuss any of the above, please contact your social care practitioner.

Yours sincerely

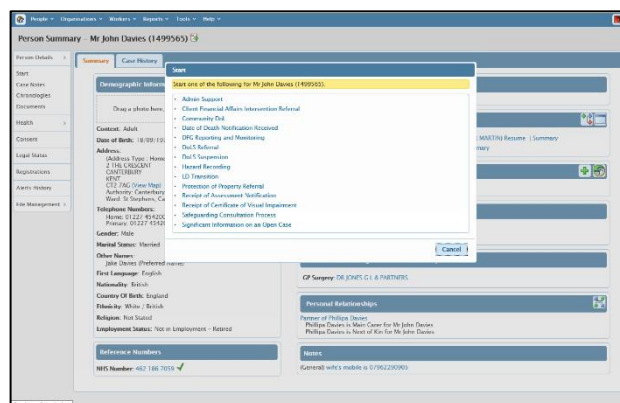
Appendix 2 Setting up the wellbeing charge on MOSAIC

This guide is intended for people that are PD and OP/OPMH only. There are other guides relating to LD and MH people as they are following different processes.

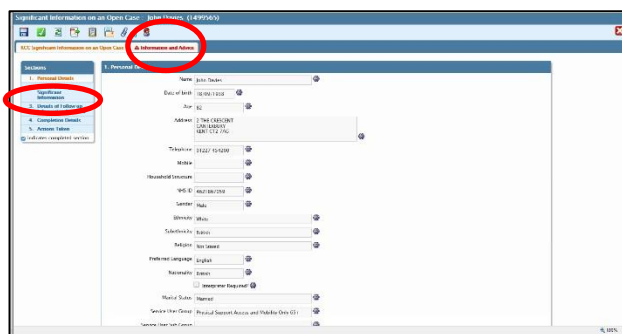
Every person should have a service and provision added for their Wellbeing Charge using the Service Element: 'Extra Care – Wellbeing Charge – Weekly.'



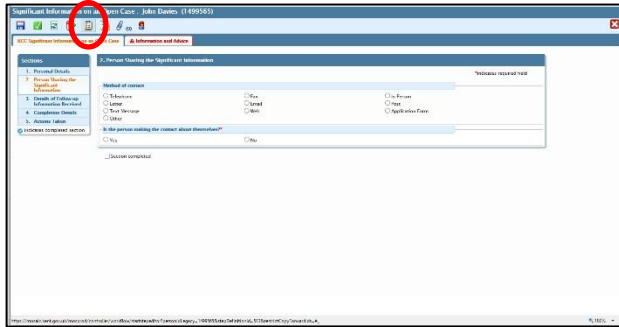
From the Person Summary screen, select 'Start'.



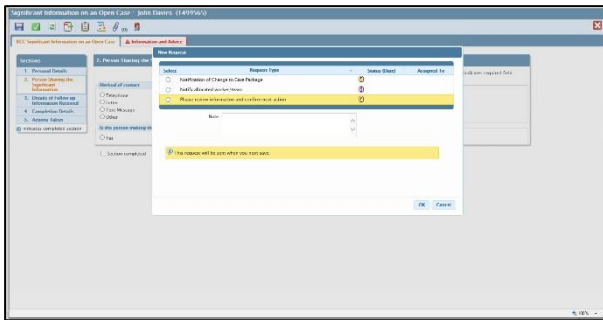
From the 'Start' list, select 'Significant Information on an Open Case'



Once open, fill-in the mandatory (Red Triangle) questions. E.g. Section 2 – 'Is the person making the contact about themselves?' Select Yes. E.g. Information and advice – select 'No' and tick the 'last completed box'



Select the 'Requests' icon.

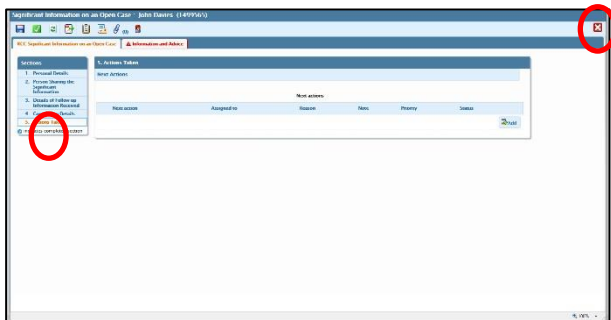


From the list, select 'Please review information and confirm next action.'

In the 'Note' Box, write something like, "Please add Wellbeing Charge Provision with effect from X date."

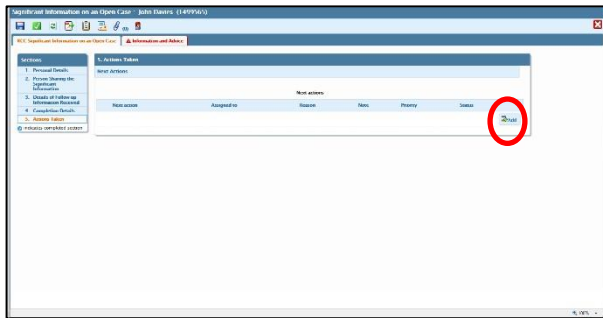
Select 'Pass to Team' and type "Community Care Purchasing" in the 'Name' box.

Press 'find' and then select your locality's Purchasing Team. Then press OK

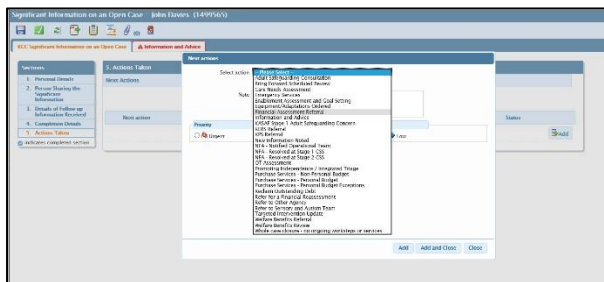


This request will not send to Purchasing until the workflow is saved. You can now press 'Save' and then 'Close' (Red X) and await the Purchasing Team's response.

If the person requires a financial assessment:



Select 'Section 5' on the Significant Information workflow. You can then select 'Add.'



Select 'Financial Assessment Referral' from the dropdown list. Tick the box: 'Send Immediately?' Then select 'Assign To Me.'

You can then Save and Close the Significant Information workflow and begin the 'Financial Assessment Referral' workflow as normal.