Adult Social Care Newsletter

Devon County Council

Issue 31 – October 2016

Changes to how representative details are recorded in the My Assessment and My Care and Support Plan

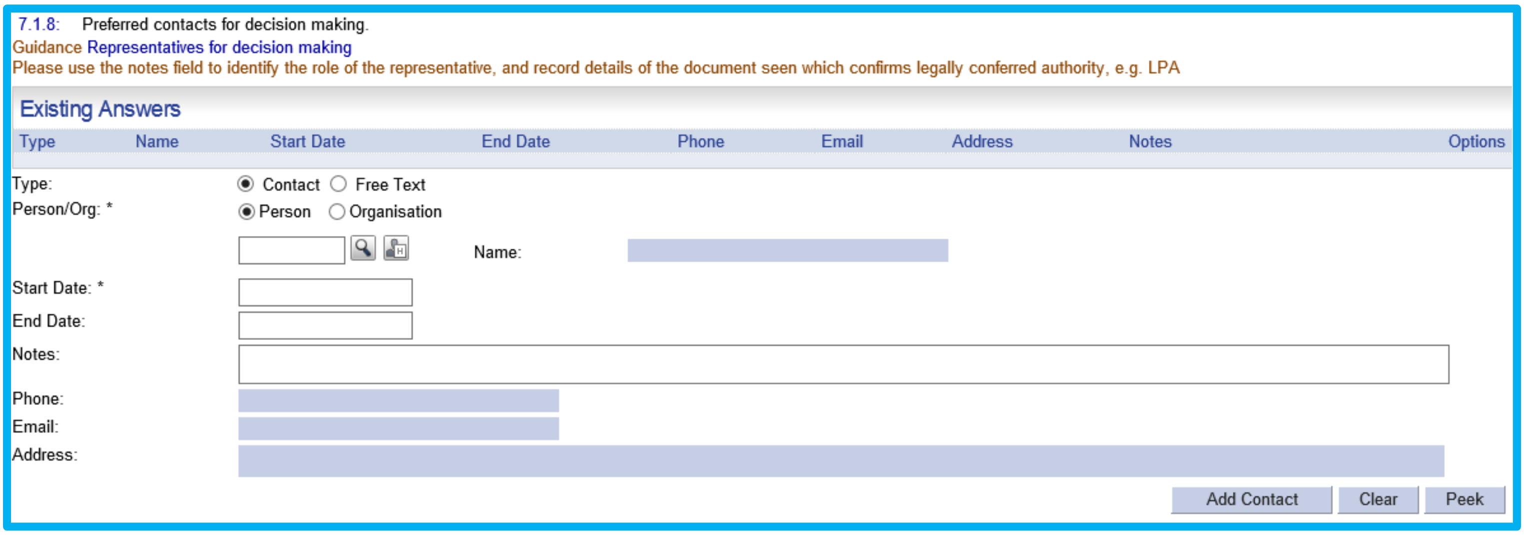
From **Monday 17 October**, the way representative details for decision making and financial representatives are recorded in the My Assessment, and My Care and Support Plan, is changing.

What are the changes?

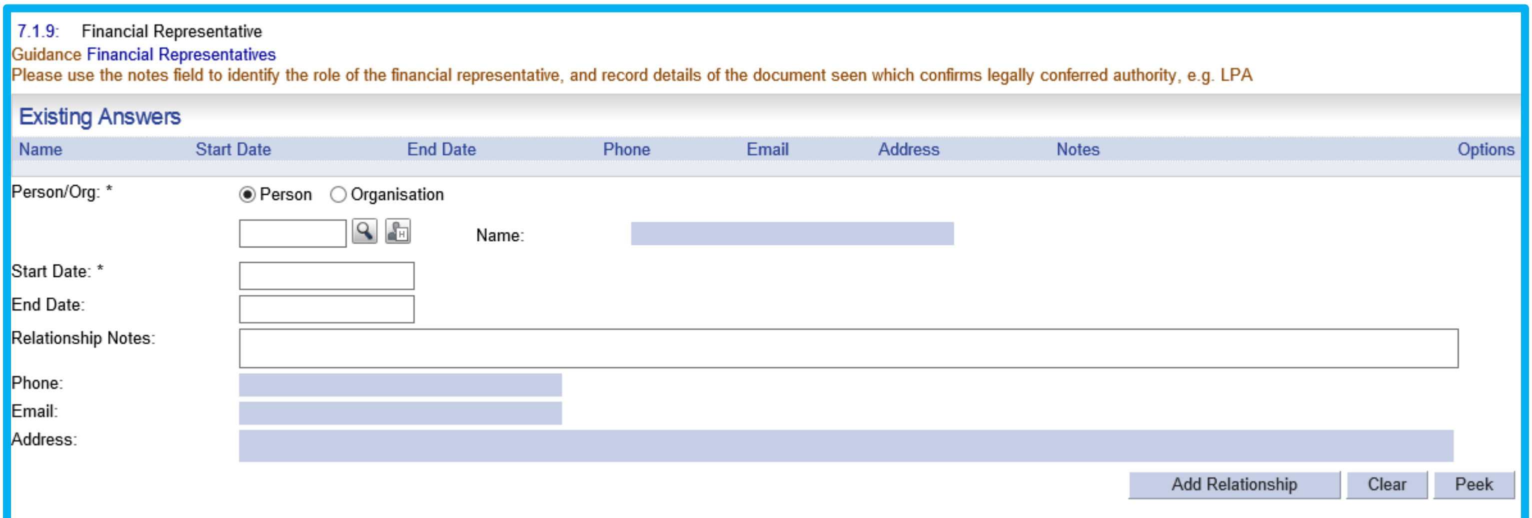
1. **Financial representative details will no longer be recorded in CareFirst as a 'contact', instead they need to be recorded as a 'relationship'.** This means that all individuals identified as financial representatives will need to be added to CareFirst as a person in their own right, prior to the 'relationship' being recorded in the My Assessment. (NB. This is similar to how the system is set up to identify a carer for a person).

2. The **existing My Assessment question** '7.1.8 Preferred contacts for decision making and financial issues', and **My Care and Support Plan question** '6.1.8 Preferred contacts for decision making and financial issues', **will be split into two separate questions**:

   The **first** question will focus on capturing details around **contacts for decision making only**.



   The **second** question will focus on capturing details around **financial representatives only**.



IMPORTANT REMINDER: The notes field for both questions **MUST** continue to be used to identify the **role of that person's official capacity** to be dealt with on behalf of the client, and what **documentation / evidence** has been seen **confirming legally conferred authority**.

3. The **supporting guidance** around **Representatives for decision making** and **Financial Representatives** has been **updated**.

Why are the changes being made?

- **To assist practice** - It will assist the Charging for Care Team to easily identify who are financial representatives, and the capacity within which they operate. In turn this will help to quicken the completion of the financial assessment, as the team will be clearer about who they should be speaking to.

- **For system integration purposes** - The CareFirst system supplier, OLM, has made a decision on how financial representatives should be recorded in CareFirst, in order to allow system integration between CareFirst and Fiscal (OLM's Platform for Care offering for financial information). By following their recommended set up, Devon can benefit from the automatic transfer of financial representatives details between CareFirst (as the master record) and Fiscal, without the need for rekeying data. The Fiscal system is being implemented in Devon in Autumn/Winter 2016 to provide a new Billing and Deferred Payment Agreement System for the Charging for Care team.

- **To improve contact between Devon County Council and its citizens** – If Devon were to undertake a consultation exercise akin to the recent Disability Related Expenditure (DRE) consultation, it would:

    a) Be useful to clearly identify a formal financial representative with whom we need to speak with. The current set up of the question in the My Assessment made this task extremely difficult for the DRE consultation, and we received complaints for not contacting the correct individual

    b) We would be able to reduce the anxiety and confusion caused to people receiving letters when they shouldn't, by sending letters to the appropriate person in the first instance.

    c) It would help to reduce the risk of financial representatives not being aware of situations they really need to know about, by sending letters to the appropriate person in the first instance.

If you have any queries regarding the above information, please direct them to the Adult Way We Work group – adultswayweworkgroup-mailbox@devon.gov.uk

Source: Adult Commissioning and Health - Transformation Team