

My personal health budget journey

This leaflet has been designed to help explain the personal health budget application process



Step 1 Getting Started

If you are eligible for CHC funding, the Assessor will explain what a personal health budget is.

If you decide that you want to apply for a personal health budget or would like more information, you will be contacted by letter enclosing a leaflet about personal health budgets.

You will contact the PHB lead to confirm that you want to go ahead with the application process.

Step 2 Completing your workbook

You will be allocated a Care Co-ordinator.

You will be provided with a workbook for you to complete. This will contain information about you and your life.

You will be provided with an indicative budget so you can start thinking about how you would like to spend your budget.

Step 3 Agreeing your outcomes

Your Care Co-ordinator visits you and together you agree your health and wellbeing outcomes.

You will be provided with a detailed leaflet about having a personal health budget for you and those around you.

Step 4 Planning your care

You will be referred to a Brokerage Support Service who will help you to create a care and support plan. Your care and support plan decides how you are going to spend your budget to meet your agreed health and wellbeing needs.

You will decide how your personal health budget will be held (e.g. notional, third party or direct payment).



Step 5 Getting the plan agreed

Your completed care and support plan is sent to your Care Co-ordinator. It will need to be considered and signed off. This is to ensure it is legal, safe, effective and affordable.

Your final budget will also be agreed.

If the care and support plan is not signed off, you may need to return to Step 4.

Step 6 Setting up finances

You will need to sign an agreement that sets out your and Bristol Clinical Commissioning Groups personal health budget responsibilities if you are receiving a direct payment.

The financial arrangements will need to be set up by Bristol Clinical Commissioning Group.

Step 7 Payments start

The first payment will be made to allow you to set up services to meet your agreed health and wellbeing outcomes.

You may receive an informal telephone call from us just to make sure everything is okay.

Step 8 Reviews

You will have two types of review:

1. A clinical review
This will look at whether the services you have bought are helping you to achieve your health and wellbeing outcomes. This must be conducted at least annually.

2. A financial review
This will be conducted every 3 months to ensure that you are spending the budget as agreed. It will help to identify if any changes need to be made.