

# Contents

<b>CONTENTS</b>	1-2
Emergency Contacts/Out of hours	3
How to use this handbook	4
Finding what you need in the handbook	5
<b>ABOUT US (Section 1)</b>	6
Welcome from the CEO	7
Our Values	8
Our Staff Team	9
Our Shared Lives Coordinators	10
Our Funding and Benefits Team, Our People and Culture Team and Admin	11
Our Business Support Team and Leadership Team	12
Trustees	13
Approval Panel	14
<b>WHAT WE DO (Section 2)</b>	15
What services do SLSW provide	16
Adult social care/what social services are responsible for	17
Did you know?	18
Important Legislation	19
Care Act	20-22
Mental Capacity Act	23-24
Equality Act	25
Approval Process/Deapproval of a Shared Lives Carer	26-27
Your Role as a Shared Lives Carer	28
Responsibilities	29
Confidentiality/Social media guidance	30
Carer Training and Development	31-32
What Carers Need to Know About Supporting Individuals with Finances	33
Standards of Accommodation	34-37
Key Documents	38-40
You and your Shared Lives Coordinator	41-45
Did you know?	46
Other sources of support	47-51
Shared Lives Plus	52
CQC and Safeguarding	53-54
When to keep us informed	55-58
Keeping Everyone Safe	59-60
Matching and Introductions	61-62
<b>SHORT BREAKS (Section 3)</b>	63
Short break section -overview/ principles/paperwork	64
Short break section-Prior to first stay/what the fee covers/first stay	65
Short break section- After the first stay/further stays/if a break is cancelled	66
Short break section- Mileage payments/expenses/extended stays/what happen if something happens meaning the person can't stay in your home	
What if the person isn't collected	67
Making claims/Payment/Cancellation/Policy	68
<b>LONG TERM SECTION (Section 4)</b>	69
Overview	70
The responsibility of the local authority	71

How your fees are calculated/banding levels	72-74
Maximisation of Benefits	75
Fairer Charging	76
Appointeeship	77
Payment Arrangements	78
Self Funders and Direct Payments	79
Mileage and Transport	80-81
Helping the person manage their money- disposable income/other records/paperwork	82
Financial Record Keeping	83
Other Finance Issues- Fuel allowance/TV Licence/Council Tax Discounts	84
Education/Free Bus Travel/Blue Badges	85
Film cards/Help with water bills/Gas and electricity discounts	86
Free dental and prescription services/Carer's Credit/Carers Allowance	87
Did you know?	88
<b>HOLIDAYS AND RESPITE (Section 5)</b>	89
Taking holidays and breaks- making arrangements for and planning breaks	90
Taking holidays and breaks- paying for breaks, why am I not getting this money directly as part of my monthly payment?/ What If I spend it all then a person using the services leaves	91
Arrangements for holidays for people using our services	92-93
Feedback, compliments and complaints	94
<b>APPENDICES</b>	95
Devon , Cornwall and Torbay Payment Arrangements	96
Tax and National Insurance for Shared Lives Carers	97

# Contacts

## Contact us during office hours...

Devon office on 01626 360170 Cornwall office on 01209 891888 Somerset on 01460 477980

Short breaks direct line: 01626 882568 Funding and Benefits direct line: 01626 882560

## Emergency Contacts

### Out of hours after 5pm...

If there are any issues out of hours Monday to Thursday, leave a voice mail message on the office telephone and someone will call you back the next day.

### At weekends and Bank Holidays ...

We provide an on call service which is available from 9am until 5pm where emergency telephone support is provided by a Shared Lives Coordinator.

If you need support during this time, call **01626 360170** and listen to the recorded message which will contain contact details of who you will need to call.

**It is important to have a pen and paper handy.**

If you have a situation requiring a response after 5pm on Saturday, Sunday or a Bank Holiday, you will need to contact the Emergency Duty Team for your area.

This service only deals with emergencies and may not be able to send someone to visit you. Call them if you need help finding somewhere else for someone to stay:

Devon	0345 155 1007	Torbay	0300 456 8000
Cornwall	0300 1234 131	Plymouth	01752 668000/ 01752 346984
Somerset	0300 123 2327		
Somerset direct	0300 123 2224		

## Why you might need to call the out of hours service

- Any incident that has to be notified to the CQC – serious injury to or death of a person using the service; incidents reported to or investigated by the police; abuse or allegation of abuse
- Death of or serious injury to a carer or carer's close relative
- Outbreak of any serious infectious disease
- Unexplained absence of a person or persons using the service of more than 12 hours
- Any complaint or allegation of misconduct
- When you need help to talk through a difficult situation

*our accident and incident form and body map can be downloaded on our website on our dedicated carer page.*

# How to use this handbook

This handbook is for online use and is split into six sections:

1

## About us

Within this section you can read about our values, our staff team, CQC, Shared Lives Plus and other support, the Care Act, Mental Capacity Act.

4

## Long term

This will give you information on banding levels, payment breakdowns and a summing up of the responsibility of the local authority.

2

## What we do

A summary of the organisation, roles of the staff team and descriptions of the department.

5

## Holidays and Respite

Guidance on what to do when wanting holidays and respite breaks.

3

## Short break

Read about the values and principles, find out what's expected during the stay and learn more about the fees.

6

## Policies

All of our operational policies can be found in the handbook to help you in your role.

There are also sub sections to help navigate your way through the handbook:

Important Legislation

Approval process

Key Documents

You and your Shared Lives Coordinator

other sources of support

CQC and Safeguarding

Matching and Introductions

Appendices

# To help find the relevant information you are looking for...

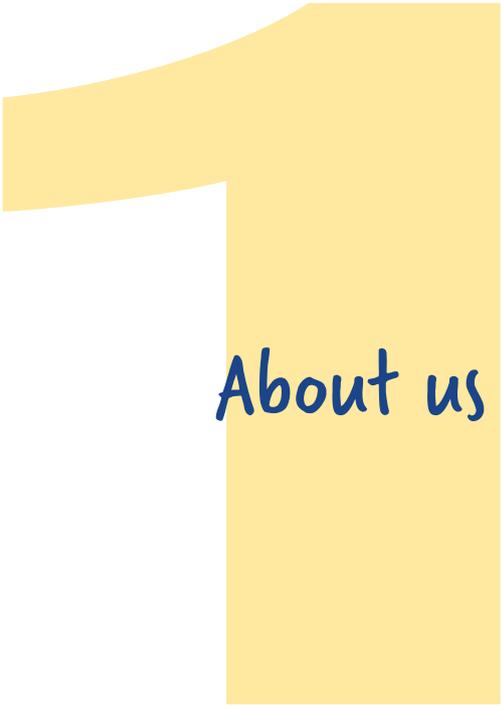


Download the PDF version from our website.

Once open, you can search a word by clicking '**ctrl F**' and it will then find the relevant word you are looking for.

For example if you need to look up 'If there is an accident at home involving the person you support'.

Click '**ctrl F**' on your keyboard then search 'accident' it will then tell you and navigate you to all the times that word is mentioned in that handbook section and you should be able to find exactly what you need.



# Welcome from the CEO

## To all Shared Lives Carers,

We have compiled this handbook to help support, guide and help you do your job.

Using the skills and experience of our staff team, legislation, research and references we've created this handbook with the aim of it being an essential source of information for you.

We hope the handbook will help answer questions you may have about your role and importantly, it also makes sure we all comply with regulations.

All of our policies are also in the appendices of the handbook if you require more information.

The SLSW team are also available and happy to answer any queries you have about being a Shared Lives Carer and are always just a phone call away.

The handbook will be updated regularly with the latest policies, information and guidance to help make you the best carer you can be and help keep the person/people you support safe in your home.



A handwritten signature in blue ink that reads "D Spayne".

**Dominic Spayne**  
CEO at Shared Lives South West

# Our Values

**Our vision:** To be recognised as the leading provider of Shared Lives services in the country.

**Our purpose:** To make a positive impact on the lives of the people we support.

**Our values:** Putting CARE into everything we do:

**C**ommunity- Working together with a shared purpose and belonging to achieve common goals

**A**utonomy- Empowering people to take ownership and accountability for decision-making

**R**esilience- Building the strength and character to embrace change and challenge

**E**quity- Giving people what they need to have equal access to opportunities in life

# our staff team

## At Shared Lived South West we:

Listen, engage, grow the support we offer, work with other organisations and put the people who we support at the heart of the charity.

### Shared Lives Coordinators

Support, listen, match, resolve complex issues, monitor well-being, signpost and mediate.

### Funding and Benefits team

Funding arrangements, appointeeship and benefits, contributions and personal allowances.

### Communication

Events, newsletter, website, social media, inspirational stories, networking, news.

## Carers &

## People

## who use our services

### Leadership Team & Trustees

Planning, governance, continuity, compliance, contract management, recruitment.

### Business Support

Offer support to the staff teams in IT, finance and the Leadership team.

### Admin team

Disclosures & Barring Service, insurance, training, communication.

### Finance team

Payments to carers, suppliers and staff, invoicing local authorities, budgeting, monthly reporting, banking, respite, short-breaks

# our staff team

## Our Shared Lives Coordinator team:

- Provides support to an allocated case load of carers
- Monitor placements
- Renegotiate band levels and additional services
- Calculate band levels
- Recruit and assess new carers
- Match those wanting a Shared Lives services



Hayley Nicholls



Fiona Glanvill



Jenny Butt



Jean Harper



Rachel Moore



Claire Connor



Suzanne Morrison



Chrissy Goodridge



Holli Hazelwood



Claire Young



Megan Parkes



Joanna Small



Chloe Banks



Mary Stewart



Sheryl Beaumont SLA



Sharon Button



Jo Polkey

SLA- Shared Lives Assistant

# Our staff team

## Our Funding and Benefits team:

- Provide benefit advice to those using our services
- Provide a money management service- appointeeship
- Provide benefit application support
- Provide Signposting (or other queries such as tax and discount advice for carers)
- Securing long term funding
- Calculating carer payments



Alison  
Langmead



Sarah  
Thompson



Cara  
Randall

## Our Admin team:

- Provides admin support to the organisation
- Arrange carer training days, carer meetings and events
- Oversee carer compliance e.g.insurance, DBS etc
- Arrange on call cover



Sam  
Baxter



Betsi  
Filbey



Chloe  
Boyd



Nicholas  
Jessup



Penny  
Smith



Jackie  
Webb

## Our People and Culture team:

- Recruitment
- Provide support to the Leadership Team
- Promote Shared Lives South West
- Carry out marketing and communications



Dawn  
Gillingwater  
Communications  
Officer



Claire  
Waring  
Leadership  
Team  
Assistant

# Our staff team

## Our Finance and Business support team:

- Provide IT support to the scheme
- Arrange payment of salaries and carer payments
- Carry out accounting for the scheme
- Manage the invoicing for the scheme.
- Mange creditors and debtors
- Short break bookings and payments
- Respite bookings and payments



Mariana  
Wilson  
ICT Support  
Officer



Alison  
Kingdon  
Finance  
Manager



Simon  
Doughty  
Finance  
Assistant



Scott  
Knight  
Finance  
Officer

## Our Leadership team:

Each Team Leader together with the CEO makes up the leadership team, with the support of the Leadership Assistant and Communication Officer. The team:

- Works with the Board of Trustees on strategical development
- Ensures that the organisation is compliant with the Care Quality Commission
- Liaises with Commissioners and renegotiate contracts
- Manages staff welfare and development
- Promotes Shared Lives



Dominic  
Spayne  
CEO



Laura  
Maker  
People & Culture  
Leader



Edward  
Bunce-Phillips  
Team Leader



Amanda  
Maggs  
Team Leader



Donna  
Bounden  
Funding &  
Benefits  
Leader



Becki  
Shepstone  
Team Leader



Rose  
Gapper  
Team Leader

# Trustees



**Maureen Read**



**Dominic Myers**



**Michael Knight**



**Lesley Stacey-Marks**



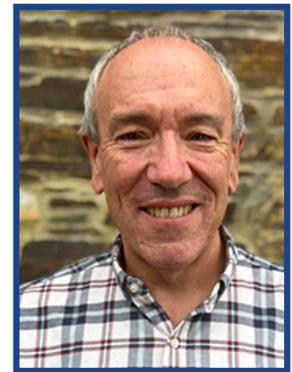
**Tim Southern**



**Nick Jones**



**Rachel Lindsay**



**Tom Golby**



**Dr Gulzar Singh**



**Claire Higdon**



**Suhail Shaikh**

As a registered charity Shared Lives South West has a board of trustees. They oversee the organisation, setting the strategic direction and ensuring that we are working within our charitable objects. Shared Lives South West trustees are all volunteers and work very hard giving their time freely to the charity. We are actively seeking new trustees to join the board.

# Approval Panel



**Louise Julyan**



**Linda Mogford**



**Lauren Trebilcock**



**Joanne Hollywood-Tucker**



**Marian Bartlett**



**Ben Edwards**



**Helen Dagley**



**Catherine Morgan**

It is recommended by Shared Lives Plus and the CQC that every scheme has an independent approval panel. The role of the panel is to consider recommendations by the scheme to approve prospective Shared Lives carers and check that there is sufficient and appropriate evidence that someone would make a safe and competent Shared Lives carer and would support people in a person centred way. Our panel members are recruited through advertising and word of mouth and are all completely independent of the scheme. They are all volunteers and do not get paid for the role, except for their expenses. Panel members are given training on their role. Panel members are normally appointed for a period of three years.

We currently have a pool of about 15 volunteer panel members, from which any panel is drawn. Each panel is made up of three people as well as a panel advisor, an SLC and a note taker.



# What services does Shared Lives South West provide?

Shared Lives South West specialises in the provision of Shared Lives services for people aged 16+. We offer:

- Long term services, where the service user lives permanently with one of our Shared Lives Carers; The expectation is that the service will last at least six months in order to allow for the benefit maximisation process to be completed.
- Short breaks, where the person stays with a Shared Lives carer for regular breaks.
- Day time services, where the Shared Lives Carer supports someone in the carer's home and the community during the day.
- Parent & child services which offer accommodation and specialist support in the Shared Lives carer's home, with a dual focus on supporting the parent and offering a stable and family based environment for the child. We do not offer assessment services in relation to parents and children.
- Home from hospital- where a carer offers reablement following discharge from hospital for a short period of time.
- Emergency short breaks, where deemed safe.

All of the above services are deemed to fit into the ethos of Shared Lives.

We also offer the following services which we provide but do not fit the ethos of shared lives. These services are not subject to the qualifying carer relief.

- Flexible support, where the primary purpose is to support the person in a community based activity.
- "Just next door" support, where the person using our services can move on to a more independent living arrangement within or very near to the Shared Lives carers home.

**See the appendices for more information**

# Adult Social Care

Shared Lives South West provides Shared Lives services under contract with each purchasing authority.

Each contract is negotiated separately with each authority setting its own terms and conditions together with fees and payments.

Each purchaser has a slightly different name for the teams that support adults. Since the Care Act 2014 there have been some changes in the way social services support people - you can read more about their duties in the Care Act Briefing on the next page.

Your allocated Shared Lives Coordinator is generally your first point of contact for any advice regarding the people you support and will probably make contact with the local authority on your behalf regarding any matters you may raise.

## Social Services are responsible for:

- Funding.
- An annual review and/or reassessment of needs for the people you support.
- Support with making a Best Interest decision for someone who lacks capacity to make a specific decision themselves as and when required.
- Support if a person using Shared Lives South West services has complex issues. e.g. safeguarding, unwelcome attention from relatives, behavioural issues, significant health issues which may require a reassessment.
- Support if you give notice or the person chooses to leave.
- Arranging access to day services when needed.
- Arranging additional respite payments when needed.

Did you know....



If you have a disability that may not be immediately obvious but would appreciate support from staff in UK airports, certain railways, supermarkets or visitor attractions, then you may be interested to know there is a lanyard you can wear to signal this.

The lanyard, which is entirely voluntary for people with hidden disabilities and their families, acts as a discreet sign for staff that additional support or help may be required.

The hidden disabilities lanyard is also called the “sunflower lanyard” because of its appearance – a strip of green with a pattern of yellow sunflowers.

Once you get one, it is yours to keep and use for future travels, shopping trips and outings where the scheme is recognised.

# Important Legislation

# Care Act

The Care Act is a key piece of legislation which is very important to Shared Lives and to the care and support that you provide.

This briefing gives an introduction to the Act but if you have any further questions please speak to your Shared Lives Coordinator.

## Overview

The Care Act 2014, which came into effect in 2015, represents the most significant reform of care and support in more than 60 years, putting people and their carers in control of their care and support.

The Act combines various existing pieces of legislation which previously shaped how social care was arranged in Britain. The intention is that the Care Act will make it easier for the public to understand why things happen in a particular way.

Importantly the Care Act also changes many aspects of how support is arranged, and aims to give greater control and influence to those in need of support.

## The Care Act

- Gives safeguarding a legal framework for the first time in law. The Act states that “Adult Safeguarding is the process of protecting adults with care and support needs from abuse or neglect”. The term ‘vulnerable adult’ has been replaced with, “any adult who has needs for care & support (whether or not the local authority is meeting any of those needs).” An Adult is anyone over 18 years of age – but remember the Act (MCA) covers 16 years +.
- Is Person Centred: it encourages workers to get to know someone in order to complete a good quality, holistic assessment of their needs.
- Focuses on Prevention.
- Focuses on well-being and recognises that is different for different people so needs to be individually assessed.
- Provides a welcome emphasis on the person who needs support being involved in what is happening to them and the provision of independent advocacy.

# Care Act

## Eligibility for services

New national eligibility criteria for care assessments should make things more consistent. These start with a three stage test:

1. The 'need' must arise from, or be related to, physical or mental impairment or illness.
2. The person must be unable to achieve two or more of the 'specified outcomes'.
3. As a result of this, there is a significant impact on well-being.

## The 'specified outcomes' are

- a. managing and maintaining nutrition;
- b. maintaining personal hygiene;
- c. managing toilet needs;
- d. being appropriately clothed;
- e. being able to make use of the adult's home safely;
- f. maintaining a habitable home environment;
- g. developing and maintaining family or other personal relationships;
- h. accessing and engaging in work, training, education or volunteering;
- i. making use of necessary facilities or services in the local community including public transport, and recreational facilities or services; and
- j. carrying out any caring responsibilities the adult has for a child.

To be eligible for services the person must be unable to achieve two or more of these. After the worker who is assessing the person has considered this they then need to think about whether, as a result of not being able to achieve two or more outcomes, there is a significant impact on the person's well-being.

## Well-being is defined as

- a. personal dignity (including treatment of the individual with respect);
- b. physical and mental health and emotional well-being;
- c. protection from abuse and neglect;
- d. control by the individual over day-to-day life (including over care and support, or support, provided to the individual, and the way in which it is provided);
- e. participation in work, education, training or recreation;
- f. social and economic well-being;
- g. domestic, family and personal relationships;
- h. suitability of living accommodation;
- i. the individual's contribution to society.

In order to be eligible - as a result of not being able to achieve two or more outcomes (the first list) this must then have a significant consequential impact on the person's well-being (the second list).

# Care Act

## Carer Neutral Assessments

Assessment should be undertaken in a 'carer neutral' way and should ignore the help someone gets. The idea of this is that the person's **WHOLE** needs are recorded as part of the assessment, which should make it easier for the person to see which service is being put in to meet each need. During the assessment, local authorities must consider all of the adult's care and support needs, regardless of any support being provided by a carer. Where the adult has a carer, information on the care that they are providing can be captured during assessment, but it must not influence the eligibility determination.

## Advocacy and having a say in what's happening

Another welcome area of change is that if a person has significant difficulty in being involved in either their assessment, their review, their care planning, or in a safeguarding, they are entitled to an independent Care Act advocate.

This cannot be a Shared Lives carer, even if you were being used 'informally' as an advocate too. However, this doesn't mean you are ignored or aren't able to be included in what is happening, as any good advocate is going to want to use your knowledge and experience.

This is likely to mean that in the future you will be working with independent Care Act advocates on a regular basis.

## If someone has difficulty:

- a. understanding relevant information;
- b. retaining that information;
- c. using or weighing that information as part of the process of being involved;
- d. communicating the individual's views, wishes or feelings (whether by talking, using sign language or any other means).

They are entitled to an advocate if they don't have anyone else appropriate to support them. An appropriate person must be someone who is not engaged in providing care or treatment for the individual in a professional capacity or for remuneration.

# Mental Capacity Act

## The Mental Capacity Act: another key piece of legislation

The Mental Capacity Act is very important to Shared Lives and to the care and support that you provide. Here is a short briefing to help you find your way around it - if you have any questions or would like to know more please speak to your Shared Lives Coordinator.

## How does the Mental Capacity Act affect Shared Lives?

Helping people to lead the life they choose is at the very heart of Shared Lives, but it's not always easy to know when to 'step in' and when to 'step back'.

When should you make a decision for someone? What should you do if someone wants to make an 'unwise choice'? How do you know whose decision it is?

This is what the Mental Capacity Act deals with - it safeguards people's rights and protects you as carers, which is why it's important you understand the law.

As well as this section in the handbook there are some Shared Lives South West policies you might want to read, and we will require you to attend the training we provide. But don't forget, your Shared Lives Coordinator is there to help too, so if you're not sure about something please just ask.

Remember: we assume everyone has the mental capacity to make decisions unless there is good reason to suspect they don't, when the following applies:

The Mental Capacity Act 2005 (MCA) gives carers protection when they make day to day decisions on behalf of an adult who lacks the mental capacity to make those decisions for themselves. These will be decisions such as what to wear, what to eat, where to go, whether to have a haircut and so on. It also gives adults who may lack the capacity to make a significant decision a supportive framework in which this can happen.

## Fundamental to the Act are the five principles:

1. A person must be assumed to have capacity unless it is established that they lack capacity.
2. A person is not to be treated as unable to make a decision unless all practicable steps to help them to do so have been taken without success.
3. A person is not to be treated as unable to make a decision merely because they make an unwise decision.
4. An act done, or decision made, under this Act for or on behalf of a person who lacks capacity must be done, or made, in their best interests.
5. Before the act is done, or the decision is made, regard must be had to whether the purpose for which it is needed can be as effectively achieved in a way that is less restrictive of the person's rights and freedom of action.

If we are not sure someone has the capacity to make a decision a capacity test is necessary, bearing in mind principle 2 above.

# Mental Capacity Act

To have the capacity to make a decision the person needs to be able to:

**H**ead – does the person have an impairment of or disturbance to the mind or brain

**U**nderstand the information given to them

**R**etain that information long enough to be able to make the decision

**B**alance/weigh up the information available to make the decision

**E**xpress/communicate their decision (could be sign language or even simple muscle movement such as blinking an eye or squeezing a hand).

Shared Lives South West provides training on the Mental Capacity Act which all carers must attend. Carers must update this training every 3 years.

## Lack of financial capacity

We support people who lack capacity to manage all or parts of their financial affairs.

To establish what financial capacity the person has we undertake a financial capacity assessment. From the outcome of this we can then work out the support they require.

If a person is deemed to lack capacity then we will involve other people to help make a Best Interest Decision regarding spending.

A Best Interest Decision should be discussed with your allocated Shared Lives Coordinator and documented prior to any spending outside the regular spending as set out within the person's plan.

## Deprivation of Liberty

Liberty means being free to do the things you want to do and live where you want to live. Deprivation of Liberty means to take someone's freedom away.

What are the Deprivation of Liberty Safeguards?

The Deprivation of Liberty Safeguards (DoLS) came into force in England and Wales in April 2009 under amendments to the Mental Capacity Act 2005.

They were introduced following a decision in the European Court of Human Rights (ECHR). The ECHR found that our law did not give adequate protection to people who lacked mental capacity to consent to care or treatment, and who needed limits put on their liberty to keep them safe.

Article 5 of the Human Rights Act 1988 requires that no one should be deprived of their liberty except in certain, pre-defined circumstances. There must also be an appropriate, legally based, procedure in place to protect the individual's rights.

When someone lacks mental capacity to consent to care or treatment, it is sometimes necessary to deprive them of their liberty in their best interests, to protect them from harm.

# The Equality Act 2010

The Act simplifies and has replaced the large number of Acts and Regulations and consolidates previous legislation into one Act.

The Act defines the various kinds of discrimination by reference to characteristics which are protected under the Act.

It seeks to prevent discrimination on the grounds of the following nine protected characteristics: age; disability; gender reassignment; marriage and civil partnership; race; religion or belief; sex; or sexual orientation, pregnancy and maternity.

## What is direct discrimination?

Direct discrimination takes place where a person treats another person who has a protected characteristic less favourably than he/she treats or would treat others not possessing the protected characteristic.

## What is indirect discrimination?

Indirect discrimination is where a provision, criterion or practice is applied which is discriminatory in relation to protected characteristic. This includes conduct which is applied or would apply to persons who do not share the characteristic in question and conduct which puts or would put a person possessing a protected characteristic at a particular disadvantage.

Conduct which can be shown to be a proportionate means of achieving a legitimate aim is, however, permitted.

The provisions contained in the Act relating to indirect discrimination do not apply to the protected characteristics of pregnancy and maternity.

## In what circumstances will the Act apply?

The Act covers a wide range of circumstances and contained detailed provisions prohibiting discrimination, harassment and victimisation in the following situations:

- where services are provided to the public
- in relation to the disposal, occupation and management of premises
- in the workplace
- in schools and further and higher education institutions
- in relation to associations.

The Act also places obligations on the public sector to advance equality, contains detailed provisions relating to transport for disabled persons and places obligations on employers and service providers to make reasonable adjustments to cater for disabled persons.

## How are the provisions of the Act enforced?

Where a provision of the Act is contravened proceedings can be brought through the Civil Courts. If the claim arises out of the employment of a person a claim can be brought in an Employment Tribunal.

A wide range of remedies are available to the Civil Courts and Employment Tribunals including the power to award compensation for injured feelings and to make recommendations to reduce discrimination in the workplace.

Normally claims brought in the Civil Courts will have to be brought within six years of the date of the act to which the claim relates and within three months in the case of claims brought in an Employment Tribunal.

# Approval Process

# Approval Process and Status

## Your approval by Shared Lives South West

All Shared Lives carers have to go through an assessment and approval process to belong to a scheme and have a person who uses our services placed with them. It is a good practice requirement of a scheme to have an independent approval panel who considers applications and the information collected during an assessment, as part of the decision making process.

All application and assessment documentation is reviewed by the approval panel, and applicants are requested to meet the panel to discuss their application. The panel will then decide whether to recommend to Shared Lives South West whether you should be approved as a Shared Lives Carer.

Your approval may come with some restrictions, set by the scheme. These will be discussed with you as part of the assessment and approval process and may include:

- Type of service : Long term services/ short break services /flexible community services/ day services/ all types of service/ any combination.
- Type of person who uses our service: people with learning disabilities/people with mental health needs/ older people/people with dementia/ parents with a learning disability/ all types of people using our services/any combination.
- The level of need of the person using our services that it would be appropriate for you to support.
- The number of people it would be appropriate for you to support: one, two or three.

Once you are approved your vacancies are added to our website so social workers or those working for a service can see what is available.

Our approval policy can be found in the appendices

## Changes to your approval status

You cannot provide any service for which you do not have scheme approval. Changes to your approval status have to be made following a specific process, with evidence to support the changes.

## Deapproval of a Shared Lives Carer

Situations that might warrant de-approval of a Shared Lives Carer will be presented to a Registered Manager for consideration, who in turn will discuss this with the other Registered Managers before reaching a decision to seek de-approval. Reasons for de-approval include:

- A proven allegation of mistreatment or abuse by a Shared Lives Carer.
- A conclusion that a Shared Lives Carer has not adopted/cannot adopt fit or safe care practices in line with the standards.
- There has been a serious breach of any of the agreements under which Shared Lives Carers and placements operate.

This list is not exhaustive and other situations may arise outside of this list where the organisation feels de-approval is warranted.

The de-approval process is detailed in the de-approval policy of Shared Lives South West which can be found within your carer handbook.

This policy also outlines the Carers right of appeal.

# Your Role as a Shared Lives Carer

As a Shared Lives Carer, you are not employed by Shared Lives South West but are self-employed. You may have additional paid employment or you may, depending on the number of and needs of the people placed with you, be full time carers. If you have other working commitments, you will need to consider how your new caring role may impact on these commitments.

The person / people placed with you should have access to your family's communal living space and be given full opportunity and choice to share in all aspects of family life.

As a Shared Lives Carer, you are expected to balance the needs of your own family with those of the person / people placed with you and give all members of the household equal choice, rights, privacy and dignity.

## Employment Status of Shared Lives Carers

In terms of tax and employment, you are regarded as self employed. This means that you are responsible for your own tax and National Insurance.

You need to consider registering as self employed with HMRC (Her Majesty's Revenue and Customs), who would deem this to be the best course of action as a Shared Lives South West Shared Lives carer.

The HMRC produces written guidance which explains how the tax arrangements for Shared Lives Carers operate. If you have any queries about the tax arrangements, please contact your local HMRC office or ask the Funding and Benefits Team of Shared Lives South West at Zealley House.

Further information can be found in the appendices.

# Roles and responsibilities of

## Your Responsibilities

The specific requirements that Shared Lives South West expects from its Shared Lives carers are set out in the handbook and in the carer agreement which forms the formal “contract” between the carer and the organisation.

This applies to all carers whether they offer long term services or short breaks or both. In summary Shared Lives South West carers have two main roles:

1. You are a professional care worker working from your own home to support someone who lives with you, visits you or lives in the community
2. You act as a landlord (for long term services) offering accommodation and household services such as meals, heat and light, maintenance, transport, sundries and so on

## What you have to do

The list given below is a summary of the responsibilities of a Shared Lives carer whether offering long term or short break services:

- To share your life and home with the person/ people using our services(s) who live or stay with you.
- To include the person using our services in all aspects of your family life.
- To work positively and cooperatively with the scheme, professionals and other people involved in the life of the person using our services.
- To help the person using our services to stay well and keep safe.
- To treat the person using our services with respect and dignity and support them to express their views and make choices and decisions in line with the requirements of the Mental Capacity Act 2005.
- To respect the right to confidentiality of the person using our services.
- To make time for yourself and other members of your household including taking breaks from your caring role.
- Comply with the Carer Agreement and follow the Code of Conduct for healthcare support workers and adult social care workers:  
<https://www.skillsforhealth.org.uk/standards/item/217-code-of-conduct>
- To maintain open and honest communication with Shared Lives South West
- To support the person using our services as set out in their “My Plan” document
- To identify any change in the needs of the person using our services and bring these to the notice of the scheme at an early stage
- To notify Shared Lives South West of any planned absences with sufficient notice and discuss and obtain approval from the scheme for any arrangement with your agreed support carers keeping any records as required by the scheme
- To engage positively in our regular support and monitoring visits and any reviews undertaken by Shared Lives South West, allowing access to your home at all reasonable times
- Retain responsibility for compliance and attend carer training and Health and Safety.

# Confidentiality

The people who live with you have the right to expect that their personal information which is available to you and to Shared Lives South West, will be treated confidentially and not released inappropriately.

Shared Lives South West Carers assimilate considerable information about people who live with them.

- All personal information about people who use our services must only be used for legitimate work purposes.
- No information about people who use our services can be shared with a third person without their consent or if considered in their best interests.
- Explain to the person using our service when it maybe necessary to pass on information without their consent, for example to protect themselves or others from harm.
- Seek the consent of the person using our services before using their personal information, following the principles of the Mental Capacity Act (MCA)
- It is important that information gained about people using our service and other aspects of their service is not discussed outside of the placement.
- There is sometimes a need to disclose confidential information to a Shared Lives worker, however, we should ensure that the disclosure is of overall benefit to the individual and is given in strict professional confidence for a specific purpose and where possible with the knowledge of the person using our services.
- All information about people using our services should be held in secure and private storage, with clear arrangements for access.
- Breaches of confidentiality will be dealt with by Shared Lives South West.

## **Social media guidance to Carers and the people who use our services.**

Shared Lives South West offers advice and internet safety training to raise awareness of how to use social media safely and the potential and risks.

The scheme also works with Shared Lives carers to protect people who use our services from posting and viewing inappropriate or pornographic material or having harmful contacts which may put them at risk or subject them to bullying or abuse.

When using social media to comment on an issue related to Shared Lives South West, the Shared Lives model, or social care in general, Shared Lives Carers should consider the effect of their comments on their reputation and that of the organisation.

When posting images on social media of people who use our services, Carers should seek guidance from their Shared Lives Coordinator.

# Carer Training and Development

Prior to approval you would have completed our pre approval training. Some of the training will need to be repeated in order for you to remain compliant.

Mandatory training includes: Mental Capacity Act, Medication, GDPR, Learning Disabilities and Autism if working with someone with Learning Disabilities and Autism, Safeguarding, Equality and Diversity training as well as First Aid training.

This video explains why learning disabilities and autism is now part of mandatory training if you are working with anyone with support needs. Link is available here: <https://youtu.be/nHQrPVzTcMk>

## Updating skills and knowledge

Shared Lives South West actively encourage all carers to take a positive approach to training and development and to continually seek ways to update and enhance your knowledge and skills. Shared Lives South West will make every effort to direct you to good quality and affordable training.

## Development needs

Training and development does not necessarily mean going on a course. This is not always the best way to learn and is not always convenient when you have a full time caring role. The important thing is that we identify the learning that is required, identify how this can best be acquired and can document that this has taken place. This meets the requirements of the regulations.

Training and development will be discussed and documented with you as part of your carer review each year and during the year if the need arises. If you attend any training or acquire new learning or skills through another means, please make sure you make your Shared Lives Coordinator is aware of it. If there is any certificate, let us have a copy.

This way we can update your training and development record on your Shared Lives South West file and this helps us demonstrate to CQC that we have a highly skilled and professional network of carers.

## Carer Induction Programme

This structured induction process is designed to ensure all new carers are fully equipped with the knowledge, skills, and support they need to provide high-quality care within the Shared Lives model.

### What to Expect During Induction

As a new carer, you will complete a comprehensive induction covering key areas such as:

- Understanding the Shared Lives model and your role as a carer
- Finance, benefits, and record-keeping guidance
- Medication management and competency checks
- Safeguarding adults and understanding your responsibilities
- Training on confidentiality, data protection, and health & safety
- Support and monitoring expectations, including household responsibilities
- Matching, referrals, and placement processes

Throughout the induction, you will work closely with your Shared Lives Coordinator (SLC), who will guide you through each stage, provide essential resources, and ensure you feel confident in your role.

## Training Expectations

As part of your induction, you are required to complete key training modules, which may be delivered via e-learning, workbooks, or in-person sessions. These include:

- First Aid (if not already completed during assessment)
- Safeguarding Adults – understanding your role in protecting vulnerable individuals
- Medication Management – administration, recording, and safe storage
- Finance & Benefits Training – responsibilities around managing finances within Shared Lives
- Person-Centred Working – supporting individuals based on their unique needs and preferences
- Health & Safety in the Carer Household – ensuring a safe environment for both you and the individual
- Confidentiality & Data Protection – understanding your legal and ethical responsibilities

You will be expected to complete all mandatory training within the first six months of your role. Any additional training needs identified during monitoring visits will be discussed and arranged with your SLC.

## Six-Month Probation Period

All new carers will undergo a six-month probation period to support their development and assess suitability for the role. During this period:

- Regular monitoring visits will take place to review progress, address challenges, and provide feedback.
- Full support with Cup of tea visits.
- Training requirements must be completed to ensure competency in key areas.
- You will receive support from experienced carers or mentors where necessary.
- At the end of six months, a probation sign-off meeting will determine whether you meet the required standards to continue as a Shared Lives carer and if you can complete cup of tea visits alone.

This induction is a vital step in preparing you for a rewarding role within Shared Lives, ensuring you have the right knowledge and confidence to provide safe, person-centred support. If you have any questions, your SLC is always available to assist.

# What Carers Need to Know About Supporting Individuals with Finances

1. **Finance and Benefits Guidance**
  - As part of your induction, you should have received and read through the Finance and Benefits Guidance for Carers. This document outlines key responsibilities and expectations regarding financial support for individuals in your care.
2. **Understanding the Individual's Needs**
  - The level of financial support required by the individual should be clearly outlined in the referral information and/or their Support Plan.
  - You should expect to receive this information from Operational Staff, who will have assessed what level of support is needed to enable the individual to manage their finances effectively.
3. **Your Role in Supporting Financial Independence**
  - You are expected to actively support and, where appropriate, teach financial independence skills. This may include budgeting, managing personal allowances, or understanding benefits.
  - Monitoring visits will be used to review how you are supporting the individual's financial skills development. During these visits, you should be prepared to discuss progress, challenges, and any areas where additional support or training may be beneficial.
4. **Feedback and Ongoing Learning**
  - Expect to receive and provide feedback on how financial support is being delivered and whether any adjustments are needed.
  - Operational Staff will identify whether you require any further training or additional resources to support the individual effectively.
5. **Working Within the Mental Capacity Act Framework**
  - You must ensure that any financial decisions or support you provide comply with the Mental Capacity Act (MCA).
  - If an individual lacks capacity for financial decisions, you must follow the appropriate processes, ensuring their rights, choices, and best interests are upheld.
  - If you have concerns about an individual's capacity or undue influence, discuss these with Operational Staff immediately.

# Standards of Accommodation

Although there is a general expectation that Shared Lives Carer's homes are dealt with as "ordinary" homes, there are some general expectations about the standards of accommodation and some specific Health and Safety requirements of Shared Lives Carers.

These should be large enough to accommodate all the people living in the home and to entertain guests. All areas should be free from clutter and all areas should be well maintained e.g. repairs carried out as promptly as possible, doors and windows should open and close properly, any plasterwork and wallpaper must be intact etc. The general decorative state is a personal matter for the Carer(s) but there are some general principles to adhere to, such as furniture must be fit for purpose and not broken.

There must be a designated sitting area, which includes enough comfortable seating for all existing household members, proposed person who uses our services and provision for guests. The home must, in its entirety, be kept clean, hygienic and free from stale odours.

Access to the communal areas must be available at all times – restrictions must be in specified cases only and noted in the Support Plan.

Outside areas should be maintained adequately to be safe e.g. there should be adequate lighting to access the property safely, paths and steps should be in good repair.

## Heating

Those parts of the home available to the user should be comfortably warm. As a guide this would usually mean that they are maintained at the following minimum temperatures when the rooms are in use unless the person who uses our services has requested otherwise: -

- Bedrooms 15.5 degrees Centigrade (60 degrees F);
- Communal Areas 18 degrees Centigrade (65 degrees F).

No free-standing gas, oil or liquid petroleum heaters must be used. Electric blankets should preferably not be used. Depending on the person's needs, constant heating may need to be provided during the daytime.

## Bedrooms

It is a requirement of the scheme that persons placed must have their own room, the rare exception being where two persons want to share e.g. a couple. Beds must be at least full-sized single beds (3ft wide). Other than in an emergency, and by agreement with the Scheme, person who uses our services should not be accommodated on pull-out sofas, camp beds etc. and should only be accommodated in rooms which are usually used as bedrooms and are vacant. Except in an emergency, and by agreement, the use of other household members rooms is not acceptable –e.g. moving children for a weekend to accommodate a short break placement.

Single rooms must be of a good size- this means large enough to accommodate furniture and to allow adequate space for dressing, storage of clothing etc. If the person who uses our service wishes to use their room to watch TV or entertain guests then the room should be large enough to accommodate an armchair.

There must be a window which can be opened to a safe degree and allow in natural light. Any room used must comply with our policy, a summary of this is in the Shared Lives Handbook.

There must be an adequate supply of bedding and this should be adjusted to take account of changing weather conditions. The bed and bedding provided should be in good condition. The mattress should be without broken springs, stains, soil marks, threadbare patches or tears. Beds and bedding must be maintained in good order and replaced where necessary.

Ideally bedrooms should be carpeted, but where there is polished flooring a slip-proof bedside rug should be provided. Carpets must not be threadbare or loose. Curtains must be clean, in good repair, preferably lined, and large enough to cover the window .

There must be adequate hanging and drawer space for the person's clothing. This would normally comprise at least one chest of drawers or dressing table and one wardrobe each. There should be a shelf or bedside cabinet by the bed. Each person should have a bedside lamp. Lampshades should be provided for all lights. There should be a minimum of two electric points per room. A small portable TV would be an optional extra. A waste paper bin should be provided. Additional bedroom furniture required due to the person who uses our service needing more storage will need to be purchased by them.

All furniture must be clean, safe and in good repair. (Ideally it should match but at least it should be complimentary). There should ideally be a mirror in each room. The room must be clean and in good decorative order. There should be a radiator or other safe form of heating in the room.

People using our services should be allowed and encouraged to personalise their room with pictures and ornaments, etc. They may wish to provide their own furniture if in a long term placement and this should be facilitated wherever possible unless it would not meet fire safety standards or there is another good reason why this can't happen.

## Kitchen

Cupboards and worktops should be kept clean and hygienic. Pets should not be allowed onto worktops or housed near food preparation areas. The kitchen must contain a refrigerator set at the correct temperature, cooker and adequate utensils and cutlery. There should be adequate storage space for food. The kitchen area must be clean, free from clutter, and there must be adequate, suitable space for food preparation. A Fire Blanket should be easily accessible from this room.

## Bathroom

Floor covering should be of the non-slip variety and firmly stuck down. Toilet paper, hand/bath towels and soap must be provided. The door must have a lock and one that could preferably be opened from the outside in emergencies. Fitments and sanitary ware must be kept clean. There should be an opening window or an extractor fan.

If the toilet is separate, then the above similarly applies and there must be facilities for hand washing.

Thermostats should be set so that hot water is stored and dispensed at safe temperatures.

## Access to the home

The person placed should be encouraged to consider the accommodation provided as their home and access must be available at all times. If the person usually attends daytime activities or employment, they may sometimes need to stay at home during the daytime.

A key should be provided and, within reason, no time restrictions enforced on entering and leaving the home. In the unlikely circumstances of a key either not being given or withdrawn, this must be recorded together with the reasons for this.

Visitors should be encouraged and made welcome at reasonable times.

## Health & Safety

Shared Lives Carers are responsible for the maintenance of their own homes and could be held liable under the "Health and Safety at work" act for any accidents or injuries which occur within their home or within the surrounds of their home such as the garden. Shared Lives Carers are required to complete a risk assessment of their home and take action to minimize the to the person using our services regarding any hazards identified.

All electrical and gas appliances should be safe and regularly serviced. A gas safety certificate must be provided annually by all Shared Lives Carers.

The scheme will not meet the cost of repairs and maintenance as these are the responsibility of the householder. Electrical appliances must be fitted with a correctly fused three-pin plug and maintained in good condition. Sockets should not be overloaded. There should be no trailing leads. The fuse box should be fitted with RCD switches.

Ideally there should be a carbon monoxide detector near any gas appliances. This is likely to become a requirement in the near future. There should be an accessible first aid box and fire blanket in the home.

Cleaning fluids and other substances should be kept in their original containers and stored safely. Tools and garden equipment should be stored safely.

The summary on Fire Safety must be adhered to (a summary is in the Shared Lives handbook

and a full copy is available upon request from the scheme). If you would like any advice about fire safety within your home this is available from the Devon and Somerset Fire Service as well as Cornwall Fire Service – contact details can be provided by the scheme

## Meals

The payment to Shared Lives Carers includes the provision of all meals within the home. Meals should be served in a dining room or area that has sufficient seating and table space and should, wherever possible, be eaten together.

Meals should be of good quality and of a size that meets the requirements of the individual. A varied and balanced diet should be offered, taking into account the individual's cultural requirements and personal tastes. Where appropriate, the person placed should be encouraged to help cook meals or provide a meal for themselves.

When dining out, the person who pays will be dependent upon the circumstances and on who has chosen this activity, if in doubt seek advice from the scheme or the "who pays" document.

## Other Facilities

Shared Lives Carers should provide an adequate laundry service or offer washing machine and drying facilities for the person to use themselves. Supervision and training may be needed for this.

The home must contain a telephone and the individual should have use of this within reason (arrangements should be made between the carer and person placed regarding payment for calls).

## Houses in multi occupation

Some carers have received correspondence from their local authorities to check to see if they are running a 'house in multiple occupation' i.e. a larger house split into bed sits or rooms to rent. Shared Lives carers do not fall into this category as your accommodation is considered a 'family home', even though you are subletting a bedroom. If you get such an enquiry, please let us know.

# Key Documents

# Key documents and what they are for

Shared Lives South West puts in place several key documents which broadly outline the important aspects of our service and our relationship with our carers and the person using our services. These are a requirement of the good practice guidance agreed by the CQC and Shared Lives Plus.

These key documents are:

## The Shared Lives Carer agreement

This is the agreement that sets out the relationship between you as a Shared Lives Carer and Shared Lives South West. It states what services you have been approved to provide, how many places you can offer, what client groups you can support, and so on.

It also describes what we expect from our Shared Lives Carers and what you can expect from us. It forms the contract between Shared Lives South West and our carers. The Carer Agreement is discussed with carers during the assessment process and should be completed as soon as a carer has been approved by the approval panel. It is signed by the carers and by Shared Lives South West.

## Individual service agreements

At the outset of each individual Shared Lives service we will send you a letter which sets out the terms for that service. You will be asked to sign a copy of the letter as acceptance of its terms. The person using our services will also be sent a letter of agreement, explaining how their service has been set up, what their responsibilities are and how to contact Shared Lives.

## “My Plan”

There are two “My Plan” documents – one for long term and one for short break services. This document sets out what is important to the person using our services and it is developed with them. It outlines the outcomes they hope to achieve and the tasks that the carer should undertake to meet these outcomes. This can be done using photos, pictures and symbols so that the person using our services has as much ownership as possible of this document.

It is an important document as it sets out the care and support that is expected from the Shared Lives carer and is an important tool in measuring how successful the service has been from the person using our services’ point of view.

The plan draws its information from a variety of sources and is usually completed by the Shared Lives Coordinator with lots of input from the person using our services and you as the Shared Lives carer.

It would also draw on the views of the care manager or social worker and any assessment that they have already done.

For long term placements the plan is completed 15 weeks after the person using our services moves in when everyone has got to know each other better. It is then reviewed on at least an annual basis, and more frequently if needed.

# Key documents and what they are for

## Licence Agreement

At the outset, each person you support will be required to have a licence agreement in place. This licence agreement sets out the rules and expectations for both the carer and the person using the service.

Under a licence agreement the person who is placed with you has no rights of occupancy. A licence agreement is merely a 'licence to stay' in your home and actually protects you as a carer. The person placed with you can be asked to leave with a notice period and has no legal means of challenging this.

## Identity Cards

All carers should have a current Shared Lives South West identity card.

- In all our dealings with the public, we should have an identity card available to show.
- ID cards should be kept on the carer's person and not worn when supporting people who use our services in the community.
- One passport photograph is required and should be returned with the completed and signed application form to your Shared Lives Coordinator. Where possible, applications for identity cards will have been completed on panel day.
- Whilst supporting people who use our services, carers may be asked to present this card to confirm their identity. For example, when supporting them at a bank, at medical appointments or at benefit appointments.
- You should report lost or stolen identity cards to your Shared Lives Coordinator immediately.
- On leaving the Shared Lives scheme, the identity card must be returned to your Shared Lives Coordinator on your last day.
- Your identity card will be checked by your Shared Lives Coordinator on an annual basis to ensure it is current and to confirm that the photograph is a true likeness.

# You and your Shared Lives Coordinator

# You and your Shared Lives Coordinator

**Your Shared Lives Coordinator is your key contact and main source of support**

**You can talk to them about any aspect of care and support, any issues arising surrounding your placements but there are certain things that they need to know.**

## **Raising Concerns / Whistleblowing**

Shared Lives has a Whistleblowing Policy which is useful for all carers to read. Our philosophy is to ensure that all employees, Shared Lives Carers and people who use the service feel confident that they can raise concerns regarding any aspect of the scheme and the services that it provides without fear of negative consequences.

If you are worried about any aspect of the organisation or our support to you and/or the people you support, then please talk this through with your Shared Lives Coordinator. We value an open and honest working relationship and strive for this to be collaborative on both sides.

We do recognise that sometimes it can be difficult to talk to someone if you have concerns about them. If this is the case, then please contact one of the team leaders who would be more than happy to talk to you about any worries you might have.

If you still feel your concern hasn't been dealt with properly after this, we would encourage you to write down your concerns and use the 'formal' route. This entails sending the CEO a letter with as many specific details about your concern as possible. We will then deal with this as a formal complaint.

## **Reassessment of needs**

Perhaps over time, you might notice that the person you support is less able to do things than they used to be. It might be that they have become unwell or something has changed meaning you are needing to support them a lot more. If this is the case, they may need a reassessment of need undertaken by the Local Authority. Your Shared Lives Coordinator can help you with this.

It might be that you feel the person's needs outweigh the banding level they were originally assessed at. If this is the case, you can obtain a copy of the banding level table from your Shared Lives Coordinator to make some notes as to where you feel their needs have changed or increased. This helps your Shared Lives Coordinator to approach the local authority and request a review or a reassessment. This process takes time and we cannot always guarantee that increased funding will be given.

# You and your Shared Lives Coordinator

## If the person you support is reassessed and as a result loses all or some of their day support

This decision should not be implemented without notice. Speak to your Shared Lives Coordinator as soon as you find out that this is being considered. If you believe it is the wrong decision they will, in consultation with the person concerned, help you to challenge it. If the decision stands then your Shared Lives Coordinator will help you and the person you support to find alternative meaningful activities so they are not left with a big gap in their daily routine.

## Medication

You need to talk to your Shared Lives Coordinator if there are any changes in the medication of the person you support. This is because we need to keep up to date records of the current medication taken by the person in case we need to provide emergency respite for you.

## Changing the support you offer

You might decide that you would like to increase the number of people you support, or to support people with different needs. Anything that differs from your original approval needs to be talked through with your Shared Lives Coordinator as they will need to complete a change of status form, taking into consideration whether you and they both feel you are able to change your current approval status. This 'Change of Status' needs to be undertaken to make sure we are providing safe care for people, and to consider any matching issues for new people and people who already live with you.

# You and your Shared Lives Coordinator

## Risks

You may notice that the people you support are putting themselves or you at some level of risk, either knowingly or by accident. In these instances your Shared Lives Coordinator can help you complete a risk assessment. The aim of a risk assessment is for everyone to identify potential areas of risk and think about strategies to reduce them. It will also give guidance as to who needs to do what, if the risk arises.

This doesn't always stop the risky behaviour from happening but it can be a way of everyone taking a similar approach in order to minimise the risk where possible.

We want to encourage people to take managed risks within their lives as this is what makes our lives interesting and also how we all learn. The balance between risk and rights can be a grey and confusing area but your Shared Lives Coordinator is there to help you work your way through these issues.

## The person you support comes home with someone you have concerns about and/or at a bad time (e.g. very late)

If this is at an inappropriate time, and/or you have concerns about the safety of the person you support or others in your household; or you just do not know the other person you are perfectly within your rights to refuse them access at that time.

However, it might be worth considering negotiating a mutually acceptable time for the guest to return in order to respect the persons' wishes and preserve the safety of others.

Speaking with the person privately as soon as possible and calmly explain your concerns ensures that they are informed about why you have refused someone access. Failing that, contact us at Shared Lives as soon as reasonably possible. Should the situation become difficult to manage you may need to seek support from the police.

## Concerns around boundaries e.g. hugging and physical contact

Generally this would not be appropriate unless invited by the person. As a Carer you should be aware that the people you support are adults, and as such should be treated the same way as any other adult. Cultural and religious differences must always be respected.

Where personal contact is concerned, this should only be at the person's request, providing this is not shown to be inappropriate within their care plan.

In certain situations this would be deemed appropriate, but you should be aware at all times of the context.

# You and your Shared Lives Coordinator

## Dealing with family members of the people you support

What if a family member turns up and wants to take the person you support away?  
In the main, if the person is deemed to have capacity and this is their wish, then you should support them in their decision.

However, as a carer you should be mindful of any safeguarding issues outlined in the person's care plan; you can use this to inform your actions when dealing with surprise visits from family members.

Explain to the family that, barring family emergencies, visits should be pre planned for the person's well-being and peace of mind, and to fit in with other household arrangements.

If the person is not deemed to have the capacity to make this choice, but seems happy with the arrangement, then they should also be supported in this and Shared Lives informed as soon as possible after the fact.

If there have been safeguarding concerns or if it is noted within any plans or agreements with the local authority that contact should not happen because the family member presents a potential risk – firstly try and explain to the family member that the person can't go today but you will contact the appropriate people and get back to them. If they persist, contact the police for support and inform Shared Lives as soon as possible. If this is out of hours please inform the duty social work team as well.

## Drink and drugs

Provided the person is deemed to have capacity, and it is their conscious decision, you should support them in their choice to enjoy social drinking.

However, if there are concerns, please contact Shared Lives in the first instance.

Excessive, regular alcohol and/ or illegal drug use won't be supported, and the first point of call in this case would be to contact your Shared Lives Coordinator.

Did you know....



Shared Lives South West has won national awards for its care work and collaborated with many other providers, charities and dignitaries both in England and abroad to showcase its innovative work.

other sources of support

# other sources of support

## Seeking support

You can only do your job well if you are also well supported, so it would be worth trying to make time to catch up with other Shared Lives Carers and access the available support when you need it.

## Other Shared Lives Carers

They can be a great source of support, which is often mutual.

We offer you a carer buddy when you join us, and encourage you to attend care meetings and social events where you will meet other like-minded people. You can share lifts, experiences, ideas and have fun. Some carers organise local social events where families get together to do group activities. Other carers meet regularly and have lunch or coffee and a catch up.

## Support carers

### What is a support carer?

Shared Lives Carers are not allowed to employ staff (i.e. people on your payroll) to do the job of supporting the person using our services instead of themselves as that is not within the ethos and concept of Shared Lives services and would detract from the family based nature of the service.

However, it is recognised you might need help in your role from time to time particularly when you want to take a break. The people you rely on to help you are known as your support carers.

A support carer is defined as a person who a Shared Lives Carer relies on to help them deliver a Shared Lives service within the Shared Lives South West scheme by:

- Providing additional support and care to a the person using our services alongside the Shared Lives South West Shared Lives carer and/or
- Providing support and care to a the person using our services in substitution for the Shared Lives South West Shared Lives Carer when they are temporarily away from the home for short periods (less than 24 hours) and/or
- Providing support and care to a the person using our services in substitution for a Shared Lives South West Shared Lives Carer when they go away from the home for longer periods (over 24 hours)

A support carer formally assumes a duty of care to ensure the well being of the person using the Shared Lives South West services, when they substitute for or work alongside the Shared Lives Carer.

You cannot use a support carer to work alongside you or stand in for you if they have not been approved as a support carer by Shared Lives South West.

# other sources of support

## Formal and informal support carers

Shared Lives South West has agreed a definition of formal and informal support carers. No definition can ensure that it is always clear whether a support carer is formal or informal, but the following pointers give a sense of the main areas to consider:

### Formal support carers

- Formal support carers will provide frequent, regular or planned support to a Shared Lives Carer by taking responsibility for the well-being of one or more the person using our services in the absence of, or alongside, the Shared Lives Carer.
- The Shared Lives Carer relies upon the support of the formal support carer to fulfil their role in the agreed way.
- The support carer is most likely to be taking the place of the Shared Lives Carer.
- Formal support carers may be paid or unpaid, but any support carer who is receiving a payment for their role is likely to be deemed a formal support carer.

### Informal support carers

- Informal support carers generally have only agreed to cover emergencies, or offer irregular or occasional support as and when needed.
- Informal support carers are unpaid.
- Informal support carers would not usually provide support in the absence of the Shared Lives Carer for longer than 24 hours.

The place where the support is provided (i.e. the Shared Lives Carer's home or the support carer's home) is not a determining factor in deciding whether a support carer is formal or informal.

## Identifying support carers

The people most commonly listed as support carers tend to be your spouse or partner, your grown up children or other family members living in the home and other friends and family who often support you who may live close by.

If you wish to propose someone as a support carer, in the first instance you need to discuss this with your Shared Lives Coordinator. They will consider what sort of support that person might give you. The Shared Lives Coordinator will decide if the support carer is defined as informal or formal.

Informal support carers who are only listed as an emergency support have to be notified to the Shared Lives Coordinator and recorded on the relevant part of the carer agreement.

# other sources of support

## Approving formal support carers

Where the support carer role has been deemed to be formal by the Shared Lives Coordinator, the support carer would need to complete an application form. This would be followed by an interview with the Shared Lives Coordinator. This process seeks to find out whether the support carer would have the necessary skills, knowledge and experience.

If the proposed support carer seemed suitable, the Shared Lives Coordinator would recommend them to the scheme. There is a simple approval process with the Team Leader as the decision maker.

The Shared Lives Coordinator would also identify any training that the support carer will need to have to be able to meet the needs of the person using our services they will be supporting. This may be mandatory as part of the support carer approval.

Once we have received your completed application form you will be assigned need to complete mandatory courses to become a Support Carer.

They include: Mental Capacity Act, Adult Safeguarding, Equality & Diversity, Health & Safety, Data Protection, Medication and Learning Disability.

Face to face First Aid training is also required

The Shared Lives Coordinator will also agree whether a DBS check is required. If so, this will be a cost to the Shared Lives Carer, which can either be paid from their respite allowance or passed onto the support carer.

If the support carer is NOT to be paid, Shared Lives South West could process the DBS check as a volunteer role which is free of charge.

## Support to support carers

Support carers will be offered access to Shared Lives South West in house training, via the Shared Lives Carer they are linked to. They can also opt to receive copies of the newsletter from Shared Lives South West.

All support carers will be able to contact the allocated Shared Lives Coordinator if they have any concerns about their role or their support to the person using our services.

## Shared Lives Carers acting as support carers

A Shared Lives Carer can if they wish act as a support carer for another Shared Lives Carer. This should be agreed with the Shared Lives Coordinator and recorded on our database.

By agreeing to do this, the carer is accepting to negotiate payment when providing cover rather than receive the applicable short break rate.

# other sources of support

## Carer Supporters

A number of experienced Shared Lives Carers have taken on an additional formalised role of Carer Supporter. Carer Supporters are there to provide additional support in the event of a Safeguarding alert or a substantial event where support is needed i.e. Death of the person using our services.

During a Safeguarding situation Shared Lives Coordinator's are required to remain neutral whilst an investigation is undertaken and so may not be able to fully support the carer involved. The Carer Supporters are there so that if you find yourself subject to an allegation and investigation, you are able to receive support. Contact the office for an up to date list and agree with your Shared Lives Coordinator how many hours support you need to access. This is because this is a paid role and so cannot be unlimited.

Alternatively come and chat to them at a Carer meeting.

## Feedback

Shared Lives South West highly values the opinions and experiences of its carers and those using our services. We seek views and ideas through our newsletters, meetings and surveys.

# Shared Lives Plus

## Shared Lives South West: part of a bigger picture

Shared Lives is available throughout the UK and is run by different schemes in different areas. In Cornwall and Devon it is run by Shared Lives South West. Shared Lives Plus is a membership network for all the Shared Lives schemes across the UK. Membership is also open to anyone who is a registered Shared Lives Carer.

Shared Lives Plus is the UK network for family-based and small-scale ways of supporting adults. We recommend you join as it is the “Umbrella body” for Shared Lives carers and there are lots of membership benefits. You will have received details of how to join in the letter confirming your approval as a Shared Lives Carer.

## Shared Lives Plus membership benefits:

- Public Liability Insurance: essential, specialist at a very competitive rate.
- Legal helpline
- Mediation
- Advice on forming carer groups
- Shared Lives Plus Newsletter
- Information on what’s happening in Shared Lives across the UK
- Specialist home and car insurance
- Tax and benefit advice

## Shared Lives Plus works with its members to:

- Provide resources, training, insurance and one-to-one support
- Enable members to talk to, support and learn from each other
- Ensure that members can act as a network to influence national and local decision makers and the development of a more personalised social care system and raise awareness of the value of members’ work
- Commission research and strengthen the evidence base for our work

# QC and Safeguarding

# Care Quality Commission Information

## Our duty of care and CQC requirements

**Shared Lives South West has a primary duty of care for every person it is providing a service for. We are required to notify CQC about certain things and need to know specific things to meet our duty of care.**

CQC monitor, inspect and regulate services to make sure they meet fundamental standards of quality and safety.

Shared Lives South West is registered and regulated with the CQC. Shared Lives South West Carers do not need to register with the CQC. This is because the accommodation provided to customers is not 'regulated premises' that the CQC can inspect.

You or the person/ people who you support may be contacted by a CQC inspector to give feedback about your experiences of Shared Lives South West. This will happen before a CQC inspection.

## Things we need to know straight away

There are some things that we need to alert our governing body, CQC, to as soon as physically possible. Sometimes this might mean contacting our emergency on call line or having to leave a message on our answer phone.

## What sort of thing do we need to know about:

- Death of a person using Shared Lives services.
- Serious injury to a person using Shared Lives services.
- Abuse or alleged abuse of a person using Shared Lives services.
- Any incident reported to or investigated by the police in connection with anyone who occupies the home.

## Why do we need to know?

- So that CQC can monitor the safety of Shared Lives
- So that your Shared Lives Coordinator knows you may need additional support
- So we can fulfil our statutory duty as a registered care provider
- So that family members of the person using the service can be made aware if appropriate

***More information about our on call service and relevant emergency numbers can be found right at the front of this handbook.***

# Keeping us informed

## If someone dies

In the sad event that a person you support dies we want and need to be notified. We want to offer you support and we also have a duty to inform CQC.

If it happens at the weekend or on a bank holiday you can use the on call service to tell us.

We know that the people who live with you become members of the family and we will do all we can to support you for as long as you need.

If a carer dies we will support the entire family including the people supported within their home.

Working closely with the whole family will give everyone support with taking the first, crucial steps to ensure that the right decisions are made for everyone.

## Accidents

In the event of an accident or incident occurring that affects a person you support, a carer or a member of staff you should take any appropriate steps immediately afterwards such as administering first aid or seeking the appropriate help. This then needs to be reported to Shared Lives as soon as possible.

An accident/incident form needs to be completed and returned to Shared Lives, and where appropriate a body map should be completed to highlight where an injury has occurred. These can be found in the forms section of this handbook.

Depending on the nature of the accident or incident it may need to be reported to CQC and other relevant bodies by Shared Lives.

## Hospitalisation Policy

Cornwall, Torbay, Somerset & Plymouth 28 nights full pay then the service stops unless the funder wants to keep the placement open, which should be discussed and agreed prior to the end of the four weeks.

Devon – as not agreed new contract 28 nights full pay, 2 weeks at 80% of care and support together with normal RHHC and then nothing – again if funder wants to extend, we need to know by the end of the 6 weeks period. Devon will move onto the new contract at some point.

## About a hospital admission

When someone you support is admitted to hospital you need to inform your coordinator as soon as possible. If this is due to a serious injury we will need to notify CQC. Long stays in hospital can also affect people's benefits. If the person you support uses controlled drugs e.g. methadone, morphine, pethidine your Shared Lives Coordinator will support you to manage this, and we have to report this to CQC upon inspection.

## If the person you support has missed medication or taken too much

If an error occurs with medication consult with a pharmacist or GP and record the event on an accident & incident form and send it to Shared Lives. CQC may require us to report such instances.

Errors can include but are not limited to:

- Someone misses taking medication.
- Someone accidentally takes it twice.
- The wrong dosage has been prescribed.

# Keeping us informed

## You will need to tell your Shared Lives Coordinator if someone is refusing to take their medication

There might be a number of different things to think about in this situation, mainly the person's mental capacity to make this decision. If they have the capacity to refuse to take their medication then you cannot force them to take it.

However, if they are refusing medication and you don't believe they have the capacity to understand the consequences of this, you will need to talk to your Shared Lives Coordinator and GP who will be able to support you with the next steps.

## If someone you support goes missing

If the missing person is normally supported continually and does not access the community independently then contact the police in the first instance and then inform Shared Lives as soon as reasonably possible.

## If the person who is missing usually goes out independently and would be deemed to have capacity to choose to be away from home it is more complicated.

- Discuss with Shared Lives Coordinator at the first opportunity and consider the possible risks. The police may not become involved if it is a person with capacity who is generally capable out and about in the community, unless there are significant concerns or risks.
- Depending on the individual it may be a few hours or more before you could report this to the police. Police must be notified within twelve hours after someone has gone missing, if this has not happened sooner and you still don't know they are safe.

## If you've had to physically restrain someone

We have a policy about Restrictive Intervention which you should read, even if you feel it doesn't apply to you at the moment. Restrictive Intervention doesn't just cover having to 'restrain' someone in the traditional sense but could also cover having to hold someone's arm firmly and for a prolonged time, or locking the front door for their safety.

Any restriction of a person's movement is an absolute last resort. However, we also understand that in some circumstances it is required to keep the person safe. If you feel you have had to suddenly restrict someone or have had to restrain them in any way, then record what happened and call your Shared Lives Coordinator for advice.

# Keeping us informed

## If the person you support starts or finishes attending college or starts working

This will affect their benefits and as such all changes of this nature need to be handled by the Funding and Benefits Team to ensure that the individual receives the correct benefits.

## When there is a change in your family circumstances

We need to know who's living with you and if that changes in any way. This applies to anyone; partners, foster children, lodgers, grown up offspring...

- If anyone new comes to live with you or someone moves back in. This might be a partner, a foster child or a grown up child returning to live at home or someone else.
- If a family member moves out.
- If a person dies.
- If a new member of the family is born.

This is because changes can have an impact on your emotional well-being, your ability to care, the dynamics of the household, the safety of the person you support and so on. All of this can affect the stability of a Shared Lives arrangement.

## What else might you need to tell us?

### When you are thinking of moving house:

We need to know when you're thinking about moving in advance of the move.

- The local authority will need to check whether it's OK for the person, whose service they pay for, to move.
- Your Shared Lives Coordinator will need to check the new house is going to be suitable through Health & Safety checks.
- It will need to be ensured that the person using the service has been given the choice to move.
- Funding & Benefits staff will have to reapply for all the persons benefits again (because they will have a new address).
- Your Public Liability Insurance will need to be updated due to the new address.
- Fire escape plans for the new property will need to be made.

## When you are going away on holiday

We have a duty to know where the people who use Shared Lives services are, at any given time, and who is caring for them. As such you have a responsibility to tell us if they are not where we would expect them to be.

- Is the person who uses the service coming with you on holiday? As this might affect their benefits, if the trip is a long one. You may need to complete a holiday form. please find the document within the forms section.
- Have they been given the choice as to whether they come or stay behind?
- Are there any financial implications for you or the person you support?
- Is your support carer stepping in whilst you are away?

## If a member of your family is taken ill and you need emergency cover

Some scenarios can't be planned for and if you have a real emergency then you need to act responsibly to keep both yourself and the people you support safe.

If one of your support carers or another Shared Lives Carer is available, please ask them for support in the first instance.

If neither is available to provide support it is acceptable to use a person who you feel is competent to provide the support in order to cover the emergency but you must contact Shared Lives South West as soon as reasonably possible.

## Compliance Requirements for Shared Lives Carers and Support Carers

As a Shared Lives carer, you are responsible for ensuring that your training, DBS check, and insurance are up to date. You must provide proof of compliance as and when these are due. Failure to do so may result in payment being suspended until all required documentation is provided.

### Support Carer Compliance

If you are using a support carer to provide respite cover, they must also meet compliance requirements before any respite breaks can take place. This includes:

- An up-to-date DBS check
- Completion of mandatory training, including First Aid
- Relevant insurance cover (if applicable)

Until all compliance requirements are met, the support carer will not receive payment for respite cover.

It is your responsibility to ensure that any support carers you engage meet these standards before arranging respite. If you need guidance on compliance or using respite monies to cover support carers' DBS and training costs, please speak to your SLC.

# Keeping Everyone Safe

## Safeguarding: Adults and children

**Shared Lives South West has a zero tolerance approach to abuse of any kind.**

In accordance with our Duty of Care, Shared Lives South West will look into every report or allegation and follow the Care Act guidance when something needs to be referred to the local authority, reported to our governing body, CQC or reported to the police.

All Shared Lives staff and carers are required to attend appropriate safeguarding training, including refresher training every three years.

Any carers with a responsibility for a parent and child placement will also have to undertake safeguarding children training in addition to the required safeguarding adults course.

Although rare, it can happen that as soon as an allegation of abuse has been made against a Carer, the person will move out immediately. Depending on the nature of the circumstances this may affect your income.

Any carer who is known to have abused a vulnerable person in their care will be de-approved as a Carer from Shared Lives South West.

Where a Shared Lives Carer has an allegation made against them they may be able to access emotional support from our 'Carer Supporters'. These are experienced Shared Lives Carers who have had experience of safeguarding issues and who are willing and trained to provide support for other carers in times of need. This may be by phone or face to face. Your Shared Lives Coordinator can arrange this support for you at your request.

If you feel that you need to raise a safeguarding concern, then please see the emergency numbers listed at the front of this handbook and get in touch with us at Shared Lives South West as soon as possible.

# Keeping Everyone Safe

## Disclosure and Barring Service (DBS) check

As a carer you will need to undertake a DBS check. These checks ensure that unsuitable people don't work with vulnerable adults and are there to keep everyone within Shared Lives South West safe.

You will be notified when your DBS is due for renewal, which will occur every three years. You'll be required to pay for your DBS and provide original identification when requested. It is your responsibility to ensure that your check is up to date.

It is worth noting that the Online Update services surrounding DBS is not acceptable for you as a Shared Lives carer as it doesn't perform the necessary background checks on others who may live in your household.

## Public Liability Insurance

This is an essential and mandatory requirement of you as a Shared Lives Carer. You are required by the commissioning local authorities and Shared Lives South West to have suitable Public Liability Insurance in place whilst supporting any individual. Having this cover in place ensures that everyone using Shared Lives South West, including you, is safe. We have arranged, through our umbrella body, Shared Lives Plus, a great product at a competitive price that is hard to match on the open market. Any support carers formally approved by the scheme will also be included on this policy.

You'll be given all the information you need to purchase the recommended Public Liability Insurance at the time of your approval. The policy will then need renewing annually. In order for us to know that you are covered, you need to show us your policy certificate each time you renew.

If a Carer chooses to use an alternative insurance provider, it must meet the requirements outlined below:

- Public & Products Liability £10,000,000.
- Abuse sub-limit any one period of insurance £5,000,000.
- Malpractice GBP £5,000,000.
- Professional Indemnity (including libel and slander) £2,000,000.
- Employer's Liability (Contingent) £10,000,000.

## Record keeping

Record keeping plays an important part in the role of any Shared Lives Carer and you will be expected to keep records and information around the following topics:

- Up to date care plan.
- Medication.
- Incidents and accidents that need reporting.
- Mental Capacity assessments and Best Interest decisions.
- Anything else that you deem important or unusual.
- Money management recording.

Remember, you can always talk to your Shared Lives Coordinator for advice on what to record and what not to record.

# Matching and Introductions

# Matching Process

How we find the right person to share your home is probably the single most important step we take and is at the heart of every Shared Lives South West arrangement.

Matching ensures that the person looking for the service and the Shared Lives Carer can make an informed decision about both longer term commitment and also short break services. A thorough and transparent introductory process helps to ensure the stability and quality of matches.

## Long term and Short break matching and introductions

Shared Lives South West receives a written referral which is passed onto the relevant Team Leader, which is then discussed with the team to find the best match.

- Once allocated a Shared Lives Coordinator (SLC) may request further information to help with the match including whether funding has been agreed.
- The SLC will show the referral to one or more carers. Where possible, the carer will also meet the referred person and their family this is generally referred to as a “cup of tea” visit. There is no fee payable for this.
- The person requiring the service can have as many “cup of tea” visits with as many carers as they wish.
- It will also be an opportunity for the person to have a look around the carers home, meet the carers family and see the room on offer and check that the layout of the property and access to it meets their particular needs.
- This visit would include a discussion about practical arrangements such as when the first trial stay will take place, if long term or if short break how the person using the service will get to their short break and who is paying for the break and any extra costs such as mileage.
- The person requiring the service can then choose a family and arrange to go for a short break, if a long term service is being sought.
- If short breaks are the required service, generally after a “cup of tea” visit a choice is made as to which family they would like to stay with and short breaks then start – subject to funding. The break is then monitored by an allocated SLC.
- Carers always have the final say as to whether a match is likely to work. If you have any doubts we encourage you to tell us, and go with your instinct. It is better all-round not to start than to have a match break down.
- For both long-term and short break services the carer and person using the service will draw up a Plan together. This will describe what the person wants to get from their service and what support they will need to do this.
- Generally a review is undertaken after 15 weeks so the plan can be finalised and the funding reviewed.
- You will be given copies of all the information sent to Shared Lives South West.
- This will be reviewed at least annually to keep it up to date.
- The SLC will discuss and agree “contacts” with both the carer and the person using the service. This is generally a combination of visits and telephone calls and can be reviewed throughout the year.
- Your SLC will support you in liaising with the local authority where appropriate.



# 3

Short Breaks

# Short Break Section

Our short breaks service offers valuable respite for family carers.

## Overview

Short breaks are provided as a means of offering a family carer some respite from their caring role. Traditionally this sort of respite provision has been delivered in residential units or care homes, but a short break in Shared Lives offers a homely alternative which is flexible and personal.

Our short break service can also be used by Shared Lives South West carers as a way to take a break and can be funded from their respite allowance.

## Values and principles

The same values and principles that apply to our long term services also apply to short breaks.

- A flexible person-centred service.
- A service provided by families and individuals in local communities.
- A service that allows someone to share in home and family life.
- A service that values the person and their gifts.
- A service that promotes independence and choice.

A Shared Lives short break service should not operate like a bed and breakfast service or a hotel. Even though the person using the service does not live with you full time, the expectation is that you will involve them in the everyday life of your family when they come to stay with you. That is what makes Shared Lives unique.

## What paperwork should I expect to receive?

- Key information about the person (including medication records and on call information).
- Medication recording sheets.
- Referral forms and information regarding the needs of the person you are supporting.
- Risk assessment (if needed).
- Funding letters.
- Links will be provided to you, so you can make booking and claim for payment electronically.

# Short Break Section

## Prior to the first stay

You and the person using the service will receive a letter describing the short break that has been agreed. It will talk about funding arrangements, how to make bookings and list any bookings that have been agreed.

If the booking has already been made you will have been emailed a claim form, to claim payment.

Please check with the short break team if you have not received paperwork

All claim forms will be emailed to you, any queries contact short breaks

You will have received the information you need to be able to support the person appropriately, though it will obviously take time for you both to get to know each other. If you do not have this information please advise your Shared Lives Coordinator.

Your Shared Lives Coordinator will be able to answer any questions you may have and can try and find out any further information for you before the stay.

All the claim forms that you need will be supplied to you by Shared Lives South West as this process moves along. If at any time you are unsure what you need to complete on the form, contact the Funding and Benefits Team who will be able to help you.

## What the fee covers

The fee for a short break covers the provision of the accommodation for the duration of the stay, all meals during the period of the stay, full use of the communal areas of the carer's home, sole occupation of a bedroom, together with involvement in family life and family activities.

Fees are based on a 24 hour period or hourly if supporting during the day.

## First stay

The Shared Lives Carer offering short breaks should liaise effectively with the family or long term carers of the people who come to you for short breaks, and with Shared Lives South West.

The relationship between family carers and Shared Lives Carer is vitally important, especially where the break is intended to be a period of respite for the carer as well as an enjoyable experience for the person using the service.

Your Shared Lives Coordinator will help you plan the first overnight stay. You will need to prepare yourself, your home and your family for the arrival.

During the stay, you must remember to make a note of any money that changes hands and any medication that the person needs you to look after and/or help them to take. You will be provided with some forms to help you do this.

Please do not accept any monies from the person using the service unless you have been asked to do so by Shared Lives South West.

You need to advise us of any short break bookings by completing a booking form prior to the break, you will then be emailed a claim form.

Prior to the break you should have been emailed a claim form, after the break please reply to this email to confirm the break took place, together with any mileage claim this then acts as authorisation for the short break team to release payment.

All claims should be submitted by midday each Wednesday and payments will be processed to reach your bank account the following Monday. Claims received after this time will be processed the following week.

All claims should be made within 14 days to allow the tracking of the funding package and provide regular invoicing to the local authorities.

# Short Break Section

## After the first stay

You can now make a claim to be paid for the service you have provided using the Shared Lives South West short break payment request form together with any mileage claim if that has been previously agreed. Claims for mileage should be submitted with the electronic claim form.

All claims within 28 days of the stay taking place and sent by email to: [shortbreaks@sharedlivessw.org.uk](mailto:shortbreaks@sharedlivessw.org.uk) or posted to the Devon office.

Your Shared Lives Coordinator should be in contact with you soon after the first stay to see how things went and discuss whether you feel that you can offer ongoing short breaks. They will also be checking with the visitor and their family how things went from their perspective. If any specific issues or concerns have been raised by either side, then your Shared Lives Coordinator will discuss with everyone how these might best be resolved before any future stays are agreed.

## Further stays

If everything has gone well, and you and the person who stayed would be happy to spend further time together, then further visits can be booked.

If you make any arrangements to offer further short breaks to someone you have been successfully matched with, you must telephone or email the details including the dates into the Devon office.

You must ensure that the booking form has been completed and submitted for any breaks agreed, you will know we are aware of them as you will receive a response email attaching the claim form.

If you do not inform us you have agreed to a short break, but then subsequently claim the fees for the short break, we will not be able to pay you for the short break.

Or if we are unaware of a break which is subsequently cancelled, the cancellation policy will not apply.

## What if the short break is cancelled?

Sometimes, short breaks get cancelled, and this can occur for various reasons. If the person no longer wishes to take the short break, this would be treated as a cancellation and depending on when we were notified, some fees may be due.

If you as the Shared Lives Carer cancel a break that has been booked, no fees will be payable. You should always give us as much notice as possible if you are not able to offer a break that has been agreed, as the family carer may be relying on it and we would want to see if we can offer an alternative.

# Short Break Section

## Mileage payments and additional expenses

If you have been asked to collect and deliver someone to and from home, this will be agreed as part of the funding process and noted in your initial letter.

A separate claim form needs to be completed for a mileage claim and this will be included with your claim form.

You may also incur costs during the short break, depending on what you have planned as a family and what the person using the service might wish to do.

Family trips where the person using the service is coming along with everyone else might be paid for by you or them depending on the circumstances and should be mutually agreed prior to the break in order to provide clarity to all parties concerned. Special trips that are only taking place at the request of the person using the service should also be agreed before the stay, including agreement of who will pay for what.

This may include their entry fees, your entry fees and something towards petrol for a long trip. If this has not been agreed in advance and you later put in a claim for it, we cannot guarantee that it will be paid.

If an emergency arises during the short break which necessitates a long journey to hospital for example, then we might be able to make a claim for this retrospectively. If you are in any doubt what would be reasonable to ask the person using the service to pay for, please ask your Shared Lives Coordinator.

## Car Insurance

A reminder that car insurance should cover business class 1 use as per section 7.5 of your Carer agreement.

## What if someone wants the stay to be extended?

If the person or their regular carer asks if they can extend their stay, this may be possible. However the person or local authority responsible for payments would have to agree to make this extra payment first. Failure to get authorisation in advance will mean that we cannot guarantee payment.

## What if something happens during the short break?

If something happens during the short break that means the person cannot remain in your home, you need to contact your Shared Lives Coordinator or use the on call system if it is the weekend or a bank holiday. They can help you resolve the problem.

## What if the person is not collected when expected?

If the person is not collected when expected, and the delay is more than two hours, inform your Shared Lives Coordinator at the earliest opportunity and they will support you to prevent this happening in the future. Additional hours after two hours can be chargeable at the applicable hourly rate.

# Short Break Section

## Making Claims

You should submit your claim forms for payment regularly, but no later than every 14 days.

## Payment

Payments will be credited to your elected bank account within two weeks of the date of receipt of your claim.

## Cancellation/Policy

Cancellations 48 hours prior to the break will not be charged. Cancellation less than 48 hours before the break is due will be charged at 50 per cent.

## Break ending early

If the person leaves the short break service earlier than planned at no fault of the Shared Lives Carer (including admission to hospital or enjoy emergency care) the days/hours already used will be charged at 100 per cent of the total gross costs and the balance of the planned break will be charged at 50 per cent of the total gross cost.

If Shared Lives South West cancels a break, no charges will be due. If Shared Lives South West has to terminate the service part way through only those days/hours used will be charged at 100 per cent.

# 4

Long Term

# Long Term Section

## Shared Lives is not an all inclusive service

Any long term person using our services will have a range of needs that they require support with. A Shared Lives service is a very flexible service and because of the relationship that develops between the carer and the person using our services, you may find yourself supporting them in lots of areas of their life. However, it may not be possible or reasonable to expect that the Shared Lives service can meet all their needs.

The following key issues have to be considered:

- Shared Lives South West Shared Lives services are based on the principles of normal family life where no paid staff are employed. As such, Shared Lives services cannot be seen as all encompassing to meet every need that they may have now or in the future, just as is the case for family carers or foster carers.
- There is an expectation that the Shared Lives South West Carer will be available to the person who uses our service at all times just as a family member could expect. However being required to actively provide hands on support and care day and night 24/7, 365 days a year is beyond the expectation of Shared Lives and other services may be needed to support the person using the service and/or the Shared Lives South West Carer.
- A Shared Lives service should not be seen as a complete replacement for any other organised and independent activities outside of the person who uses our services (and carer's home) as this may not be in the best interests of the person using the service or the Shared Lives South West Carer and goes beyond the normal expectations and capacity of a normal family environment. The person's needs in relation to activities outside of the home with support from other people or agencies should be assessed and agreed as part of their overall care plan and they have the right to such an assessment.
- The more time the Shared Lives South West Carer is actively offering support to the person who uses our service and the higher the degree of intensity/complexity/specialist knowledge or skill involved in that support, the greater the fees the Shared Lives Carer should be able to receive.
- Shared Lives South West Shared Lives Carers are not expected, trained or insured to provide nursing or medical services (although certain specific treatment activities may be undertaken with appropriate training) and where nursing/medical services are required this should be delivered by appropriate health care professionals either in the home or in a suitable care environment.

## Entitlement to other services

Any person who uses our service that is living with a Shared Lives South West Carer is still entitled to be assessed for and where eligible receive other services to meet their assessed needs. Receiving a Shared Lives South West service does not mean that the people using our services cannot have access to any other services that they need.

# Long Term Section

## The responsibility of the local authority

The putting together of the total package of support that the person needing the service requires remains the responsibility of the local authority and its adult social care department. There can sometimes be an assumption by funding authorities that because support through Shared Lives services is available at all times, people using our services are excluded from additional funding for other things like day services or transport or support to access leisure and work opportunities.

This is incorrect. If someone suggests to you that a person using our services is not entitled to any additional support because they are in the Shared Lives South West scheme, please be clear with them that this is absolutely not the case. We will always challenge this position on your behalf. This has been discussed and agreed as a principle with the local authorities who buy our services.

It is important when setting up a Shared Lives arrangement to be clear what it is you are being asked to do from the outset and to document this in the Shared Lives agreement and "My Plan". It is also important to document the other services the person currently receives, so that if this is decreased or changed we can properly discuss how this will be addressed, without it being assumed that our Shared Lives South West Carer will fill the gap!

If you have any concerns that what you are being asked to do or are having to do to meet the needs of the person who uses our service is beyond what is reasonable to expect from you and your family, or you feel that the person who uses our service needs additional support inside or outside the home which you cannot provide, then you should discuss this with your Shared Lives Coordinator.

# Long Term Section

## Your fees and how we calculate them

### Being a Shared Lives carer is a paid role.

Although you are not paid employees of Shared Lives South West, the work you do for us as self employed carers is remunerated by the payment of a fee. This section explains how we calculate long term fees.

## The components of a long term service

The service of Shared Lives is made up of several components, each of which may be paid for from a different source. These different components all add up to give you the total fee due for the service you are delivering on behalf of Shared Lives South West.

**Payment for the accommodation** – the person who uses our service lives with you under a licence agreement. This means that they are liable to pay you rent. This forms one part of the total fee you receive as a Shared Lives carer offering a long term service and is usually a fixed amount set by Shared Lives South West across the whole organisation. The person who uses our services is responsible for paying the rent out of their income and this is not something that the local authority has any liability to pay for.

**Payment for household costs** – the person who uses our service lives with you as part of the family, and will therefore be consuming things such as food, heat and light. They will also be playing their part in the normal wear and tear of the household, and as such have some responsibility for maintenance costs. Shared Lives South West calls this “household costs” and this forms another part of the total fee you receive as a Shared Lives carer. This is usually a fixed amount set by Shared Lives South West across the whole organisation but might be adjusted depending on the household services that the person who uses our service is receiving.

They are responsible for paying toward the household costs out of their benefit income and this is not something that the local authority has any liability to pay for.

Where any added cost is incurred for additional or upgraded internet access/packages for their use, the individual supported pays for this and it is detailed in their plan.

**Payment for the care and support you offer** – you will be asked to support the person using our services in a variety of different ways and to include them in your family life. This will take up your time and require you to have certain knowledge, expertise and skills. Some of the care and support you offer as a Shared Lives carer is quite specific and some of it is just about being there, offering companionship and involvement in family life. It is therefore very hard in Shared Lives to say how many “hours of work” you might provide – “being there” is very hard to quantify and what hours are you working when you are having a normal family lunch?

We therefore do not work out this part of the payments to you on the basis of “hours worked” or an “hourly rate”. Instead we use a banding level system that tries to quantify the nature of and the intensity of the care and support you provide in any week to each person who uses our service, case by case. This forms the final component of the fees you will receive and is paid to you by Shared Lives South West.

Where the local authority has accepted the statutory responsibility to meet the care needs of the person who uses our service and they are eligible for financial support, the local authority is responsible for paying for the required care and support to Shared Lives South West, minus any contribution the person who uses our service may be required to make under Fairer Charging.

## Using banding levels to agree the fee for care and support

Shared Lives South West has a banding system to help us decide how much care and support an individual will need from their Shared Lives Carer, which then tells us what the correct fee should be.

When we receive a referral we look at the sort of support and care the person who uses our service might need and what they want to achieve, and we match this against the band level descriptors.

Some areas may need more support and some may need less, but overall it gives us a picture of the sort of level of support you will be asked to provide. This gives us a band. We also get information from the relevant care manager or social worker, who will give us their view of the Shared Lives South West band level they feel is appropriate. During the matching and introductory process, as you get to know the person who uses our service, you will give us feedback about the sort of support and care you feel you will need to provide to ensure that they can achieve their agreed outcomes.

Before the service can start, Shared Lives South West will use this information to come to an agreement with the funder of the service (social services or the person who uses our service and their family if they are self funding) and the band level is then agreed. It is our job to make sure that you get the correct remuneration for the job we are asking you to do on our behalf.

As you can imagine this is not always easy and we do sometimes have to fight very hard to get the correct fees. We also know that once a fee is agreed it is a much harder job to get it reviewed and increased, so we try to get it right from the start. We also have to be reasonable with the funders of our service and make sure we can evidence our banding level requests, otherwise it will not get approved by their funding panels.

Your Shared Lives Coordinator will discuss this with you during any introductory session and explain exactly how they have arrived at the banding level, working with the funder of the service. If you are not happy with the level of fee proposed, you must let your Shared lives worker know. Ultimately you can refuse to accept a service if you do not agree with the fees. Your Shared Lives worker and our Funding and Benefits Team are all very experienced and skilled at negotiating banding levels and will do the very best they can for you, whilst balancing your expectations and the expectations of the funder of the service.

## Banding level reviews

Fifteen weeks into the service, we conduct a review to see how things are going. After this time, you will know the person using the service much better and if it is clear that the level of care and support you need to put in is much greater than anticipated, then we undertake a banding level review. Your Shared Lives Coordinator will take you through the process and go back to the funder if there are any issues or a new band level is needed. It is helpful to document the extra work you are undertaking to back up the request for a banding level review.

Every year the Shared Lives worker will review the Shared Lives agreement and the “My Shared Lives Plan” for each person who uses our service, and again if there is an increased level of care and support required from you as the Shared Lives Carer, we may undertake a banding level review.

The banding level descriptors enable us to gather the evidence we would need to support any banding level review request, and your Shared Lives worker will work with you to gather this information from your knowledge of the person who uses our service. You should note that if the person who uses our service’s needs decrease, it is possible that the local authority may request a banding level review with a view to reducing fees.

## Reviewing the Shared Lives South West fee rates

The financial year in Shared Lives South West runs from April 1st to March 31st. Each year Shared Lives South West reviews the level of fees it offers to its Shared Lives Carers. Rent and household costs are determined by Shared Lives South West and are reviewed annually, taking into account benefit increases and affordability for those that use our services.

The care and support we pay carers forms part of the contract Shared Lives South West have with each local authority.

# The benefits maximisation process

## What is benefit maximisation?

Benefits maximisation is the process of claiming all the welfare benefits that the person using our services is entitled to receive. This enables them to pay for their rent and household costs, which forms part of the total fee that you receive as a Shared Lives carer.

Shared Lives South West, as part of the way it operates, assists the person who uses our service to claim these benefits and makes sure that, once in place, they are used to meet the required payments.

As soon as it is agreed that a person who uses our service will be moving into a Shared Lives Carer's home, a Funding and Benefits Officer or the Shared Lives Coordinator will contact them to establish their current income, financial position and to ascertain whether further benefits can be applied for.

If appropriate the necessary application forms will be completed by the Funding and Benefits Team.

## Documentation relating to benefits

Any supporting documentation for the application forms will be copied and kept with the relevant application form. The originals will be returned to the person who uses our service. The forms will then be submitted to the relevant benefits agency.

Where Shared Lives South West is not acting as the appointee, we may also ask the person using our services or their appointee to complete a third party authority form, which gives us their permission to talk to the benefits agencies on their behalf. Where Shared Lives South West is the appointee the benefits agencies will correspond directly with our funding and benefits team.

Where we are not the appointee, Shared Lives South West will not receive direct communication. If you or the person who uses our service receive any award letters from the benefits agency, these should be copied and sent to the Funding and Benefits Team or passed to your Shared Lives Coordinator who will send them in for you. If you are sending in original documents please mark "original" so we can copy and return them to you. You need to do this as soon as possible. A delay can mean that a benefit may not be paid for a period of time, and this could mean that your fees might be affected.

We ask that you do not contact the benefits agencies directly unless directed to do so by Shared Lives South West.

Once all the benefits are in place we will recalculate what the person who uses our service should be paying toward their Shared Lives service and then change the balance of payments. We will write you to confirm all the details and will make sure you understand exactly how your fees are paid and from where.

# Fairer Charging

## What is Fairer Charging?

The Government introduced a new system for Local Authorities to implement from April 2003 to ensure that people who use our services were charged a fair amount for the non residential care and support they received from the local authority. This was called Fairer Charging.

Government social care policy looks to promote independence and social inclusion, therefore recommends that the income of the person using our service should not be reduced below a certain level because they have to pay for social care services. In order to calculate a charge the total income of the person who uses our service is taken into account and offset against this figure. Any surplus income is deemed to be the amount the person who uses our service can reasonably contribute towards their care and support.

Generally, under this system all people using our services must have a detailed financial assessment and a comprehensive benefit check. This can be undertaken by the Local Authority's Client Finance Services Team or Shared Lives South West where commissioned to do so.

Financial assessments are only undertaken by SLSW for long term services only.

## How we work with Fairer Charging

Each local authority that Shared Lives South West works with has a separate Fairer Charging policy, and each one is slightly different. Shared Lives South West therefore applies the relevant policy in each locality to arrive at the amount that any person who uses our service may have to pay towards their Shared Lives service.

Our Funding and Benefits Team look at each case to check that each assessment has been applied fairly.

# Appointees and appointeeship

## What is appointeeship?

If a person who uses our service does not have the capacity to deal with their financial affairs in respect of their benefits or has been deemed not to be financially responsible, someone may be asked to take over their financial affairs in respect of benefits. The person or organisation that takes over this role will be known as their appointee.

In order to provide transparency and to reduce the potential of any allegations of financial abuse it is Shared Lives South West policy that no carers act as an appointee for anyone they are supporting.

Anyone new joining the service will automatically be reviewed and appointeeship checked and replaced as appropriate.

## Working with family members or other appointees

Sometimes a family member or a court appointed appointee may be responsible for the finances of the person using our service. Shared Lives South West will ensure that these appointees receive notification of the payments that should be paid on behalf of the person who uses our service and the amount they should retain as disposable income.

## Deputy Lasting Power of Attorney

It is Shared Lives South West's policy that no carer holds this role for anyone they are supporting.

# Payment Arrangements

Fees are paid four weekly in arrears and credited to your elected bank account a week later. A payment timetable will be provided so you can keep track of payment dates.

Payment is made by bacs and a remittance is issued to confirm the payment is made.

There are various scenarios which can affect payment, these could be:

- Death.
- Notice periods.
- Leaving without notice.
- Safeguarding.
- Storage of belongings.
- Hospitalisation.
- Reassessing of needs.

## Financial Statements

At anytime Shared Lives South West can issue you with a financial statement which will show your total income received in respect of your fees. This will also include a breakdown of how you have received your fees. This can be useful when completing any tax returns you may be required to make for HMRC.

# Self funders and direct payments

## Self funders

A self funder is someone who has more than an agreed amount (set and reviewed by the Government) in capital, which means that they do not qualify for any financial assistance from the local authority towards the services they require. This means that they have to cover the total cost of their Shared Lives service to Shared Lives South West.

## Direct payments

A person who uses our service can be given a personal budget to buy the services that they require to meet their needs. This can be given to the person who uses our service in the form of a direct payment. They or an elected member of their family or an organisation can manage these monies.

Anyone with a direct payment would buy the service from Shared Lives South West not the individual Shared Lives Carer.

A Shared Lives Carer cannot hold a direct payment on behalf of anyone they are supporting.

## Payment method

In the event of a self funder or someone using a direct payment coming to live with you or coming on a short break, Shared Lives South West will ensure that you receive your fee in full in the normal manner and then arrange to invoice the person who uses our service separately.

# Mileage and transport (Long term)

For short breaks, see the short break section

## Car Insurance

A reminder that car insurance should cover business class 1 use as per section 7.5 of your Carer agreement.

## Mileage agreements

It is expected that any person who uses our service will travel with the Shared Lives Carer as part of the normal business of the service and therefore all associated costs are already covered by the agreed fee. However it may be identified that you are incurring significant additional mileage over and above your normal 'family mileage' to meet the specific needs of people using our services.

This extra mileage could be, for example, for medical trips that have to be taken on a regular basis, specific additional activities the person who uses our service wants to undertake, transport to and from another service or college or something else specific. This can be paid by the person using our service from their DLA mobility benefit, bearing in mind that at the lowest level this is quite a limited amount of money.

Where it is agreed that an additional charge should be made, this can only be done with the agreement of Shared Lives South West. These arrangements must be documented as part of the Shared Lives agreement. A formal mileage agreement needs to be put in place as part of the Shared Lives agreement by your Shared Lives Coordinator. These shall be kept up to date and available for inspection at any time.

You cannot make an additional charge for mileage as a private arrangement as you open yourself to allegations of financial abuse by doing so.

Further information about mileage agreements is available from the Funding and Benefits Team or your Shared Lives Coordinator.

## Mobility vehicles

If the person who uses our service is in receipt of higher rate DLA mobility allowance and it is agreed that a mobility car would be of benefit to the person who uses our service, a mobility vehicle may be leased. The agreement to this lease must be documented by the Shared Lives Coordinator in conjunction with the person who uses our service and their care manager. The cost of the lease will come from the disposable income of the person using our service. All car sales garages offer their cars under the Mobility Car Scheme but some will expect a deposit or enhanced payment should a specific model be required. Any deposits would have to be paid by the person using our service.

The Shared Lives Carer would be responsible for advising the insurance company about who is the main driver and any other drivers and ensuring the vehicle is adequately insured. The car is principally to be used for the benefit of the person who uses our service and mobility regulations should be followed.

If they leave the Shared Lives Carer's home, the car would go with them or would be returned to the mobility scheme as appropriate. For more information about mobility vehicles, please contact the Funding and Benefits Team.

The person using the service should be responsible for covering the petrol costs and mileage recording sheets should be kept to record the mileage undertaken

## Passengers

Where other people are travelling in the mobility vehicle the cost can be split.

This should be covered by completing a passenger agreement and keeping mileage records.

The person to whom the mobility car belongs should receive reimbursement direct of the mileage payments.

Mileage is chargeable at the applicable rate, please check with your worker for current rates.

# Helping a person using our services to manage their money

## The disposable income of a person using our services

Part of your role as a Shared Lives carer is to enable people to be as independent as possible, to help people exercise choice and to support people to be aware of risks. These are all very important aspects of supporting a person who uses our service to manage their money. People using our services will have disposable income after they have paid any contribution towards their Shared Lives service. This disposable income is there to enable the people using our services to do the things they want to outside of their Shared Lives service and to meet their everyday personal living expenses, such as additional transport, personal items, and to take part in activities and have hobbies.

## Helping people using our services with money management skills

This is an important part of the Shared Lives Carer role. This may include:

- Helping people to understand the value of money.
- Helping people to save for large items or holidays.
- Helping people to make spending choices to meet their needs, wishes or aspirations.
- Helping people to work out and use a budget.
- Helping people with savings.
- Helping people to handle cash safely.
- Supporting people to be aware of the risks around money, including the potential for people to try to exploit them for financial gain.

## Other records and financial paperwork

Any paperwork relating to the financial matters of people using our services should be kept safely.

Where the person supported is claiming Disability Related Expenses, receipts should be kept regardless of value as these will be required as evidence.

## Financial Record Keeping

All regular spending will be recorded in the plan and this should be adhered to. Remembering that for anyone who lacks capacity we follow best practice under the Mental Capacity Act.

Generally if the person you are supporting has a bank account, then each bank statement should be annotated with the expenditure.

Receipts should be kept and attached to the bank statement for expenditure over £50.00. Records should be kept in order and available for inspection.

Where the person requires support to access their money from the bank, a chip and pin agreement should be in place. For those that do not have a bank account, any other types of recordings will be explained on an individual basis.

Shared Lives Carers should not at any point hold a joint bank account with anyone they support or hold money in their own personal bank account.

# other finance issues

## Winter Fuel Allowance

Winter fuel payments are now only payable to people who are in receipt of Pension credit and those with a income under £35,000.

A winter fuel payment is an annual payment to help people with winter heating bills. The winter fuel payment is made to the person who uses our service. There is no automatic right for this payment to be paid over to the Shared Lives Carer even though they may be paying increased fuel costs for the household during the winter. If the person you support through Shared Lives services meets the above criteria and is not receiving winter fuel payment, please inform us so that we can apply for this benefit on their behalf. Where there are increased fuel costs in the winter, for example for older people who may spend more time indoors or need a higher temperature for their well being, Shared Lives South West may charge an additional winter fuel charge to people using our services. The Funding and Benefits Team will be able to advise you as to whether this applies.

## TV Licence

The current advice is that a person who uses our services and lives with you as part of the family does not need a separate TV licence. You do not need to even get a concessionary licence – so long as you have a TV licence, all the TVs in the home will be covered. If you have any problems with the TV Licensing Authority, please let us know.

## Council Tax Discounts

### Disablement Relief

If your property has been adapted for the use of a disabled person, for example you have had extra bathrooms installed or doors widened for wheelchair use; you may qualify for a reduction in your Council Tax. If you think you qualify for this reduction, please contact your council tax billing authority and ask for a Disablement Relief Form. The granting of this reduction usually entails a visit from the Council to inspect the property, but this is very straightforward. Please check with the Funding and Benefits Team first.

### Carers Discount

Based on the number of residents in your property and who is providing care, it may be possible to apply for 'carer's discount' on your council tax. This is a discount which may reduce your council tax bill by at least 25%. Again it will be necessary to contact your local council tax office to enquire about this discount. Please check with the Funding and Benefits Team first.

### Annexes/self contained units

If, within your property, you have an annexe or self contained flat being used by a person who uses our service, this would be considered as a separate dwelling and will be assessed for council tax in its own right. The person who uses our service residing within a self contained unit should be applying for council tax benefit so that no council tax is payable.

If your annexes/self contained units have not been allocated separate council tax liabilities, it may be that they have been missed by the local authority. There is a risk that at some point in the future, if the Inland Revenue revaluation goes ahead, that they may be picked up and then the council tax liability backdated, perhaps for several years!

## Education

### College grants/bursaries

Discretionary bursaries have replaced Educational Maintenance Allowance. Applications should be made to the relevant college as soon as possible in the academic year.

### Free school meals

It is possible that a young person who uses our service aged 16-19 would qualify for free school meals. Please check with the school.

### College travel

Subsidised travel may be available. Please check with the college.

## Free bus travel

Free bus travel is available on the grounds of age or disability. Please refer to your local authority to see if you or the person you are supporting qualifies for this help. Remember companion passes can also be considered.

## Blue badges

Anyone over two years old automatically qualifies for a Blue Badge if they:

- Are registered blind.
- Are receiving a War Pensioner's Mobility supplement.
- Are receiving the higher rate of the mobility component of Disability Living Allowance.
- Have a permanent and substantial disability which means they cannot walk, or makes walking very difficult.
- Drive a motor vehicle regularly and have a severe disability in both arms, making it very difficult or impossible to operate a parking meter.

Local councils are responsible for issuing Blue Badge parking permits. They will send you an application form which you will need to fill in and return with two recent passport-sized photographs of yourself. Some councils charge a badge issue fee.

Most Blue Badges are valid for three years. This period is so the local authorities can check that you still qualify, as some disabilities can improve over time. It also helps them keep their contact details up-to-date and issue the latest version of the Blue Badge.

The Blue Badge is valid for less than three years if you are either receiving:

- The higher rate mobility component of Disability Living Allowance.
- A War Pension Mobility Supplement.

In these cases, the period of issue of the badge will tie in with the period of the benefit. You do not need to own a car or be able to drive one. You can use the Blue Badge in any vehicle that you are travelling in as a driver or a passenger. The following link gives more information about whether you can get a Blue Badge.

An online service is available, which makes it much easier for disabled people with a Blue Badge to find a parking bay. The interactive Blue Badge parking map allows disabled people who drive or travel as passengers to search by postcode or town/area for Blue Badge parking. The map gives details of any time restrictions or special notices that apply to individual bays. It can also be used to find parking bays that fall on red routes in London and accessible petrol stations. The Blue Badge parking map can be found on:

<https://bluebadgeparking.com>

You can also visit: <https://www.gov.uk/where-registered-disabled-drivers-can-park>

## Do you like a good film?

It may be possible to gain free entry for a person accompanying a disabled person to the cinema. This is operated by CEA (the Cinema Exhibitors Association) This is a national organisation and large national cinema chains and small local cinemas often participate. An application form can be downloaded from the website [www.ceacard.co.uk](http://www.ceacard.co.uk) which also lists those cinemas participating in the organisation.

If you do not have access to the internet, please contact your local cinema to ask if they are participating in the organisation and they will send you an application form.

The card should be applied for in the name of the disabled person and a photograph is required.

## Help with water bills

Financial assistance can be given to those households that use a water meter and feel that they use extra water due to someone's illness in the home. The illnesses are defined as:

- Desquamation.
- Weeping skin diseases.
- Crohn's disease.
- Kidney failure.
- Abdominal stomas.
- Incontinence.
- Ulcerative colitis.

To be eligible, the person has to be in receipt of, and show entitlement letters for, certain benefits

## Gas and electricity discounts

Several gas and electricity companies are now offering discounts on their gas and electricity prices for vulnerable or low income customers. Each company seems to refer to discounts in different ways but if you ask for "details of discounts for vulnerable or low income customers" or "energy assist social tariff" this should steer the customer services operator in the right direction.

## Free dental and prescription services

People with disabilities are entitled to free dental and prescription services, depending on what benefits they receive. Please check with the Funding and Benefits Team for clarification and supporting evidence.

## Carers Allowance

Shared Lives South West Carers are remunerated for their caring role and should not be claimed for as part of their Shared Lives services.

It can be claimed if the carer is supporting others outside of their Shared Lives role, but this is still means tested in that the amount you can earn is restricted.

Did you know....



**We have been established for more than 20 years and we are currently rated as Outstanding by the Care Quality Commission**



# 5

Holidays and Respite

# Taking Holidays and breaks

## The need for breaks

Every household and every Shared Lives service is different, but Shared Lives South West believes that from time to time taking complete breaks away from your caring role will help you as a carer to stay well and feel able to meet the demands that the role places on you. This is also stated in the CQC and Shared Lives Plus good practice requirements.

Depending on the alternative placement used by the people being supported, we can assist Carers to have on average 14 days complete break per year. This will vary depending on the cost and availability of the alternative placements. Where the person being supported has very complex needs, we will endeavour to work with the local authority to secure any additional respite support that might be needed

## Taking and arranging breaks

Some Shared Lives carers have told us that they feel that it is wrong to take a break from the people they support, who are members of the family and they do not want or need a break from them. We understand this, but still feel that it is something to be seriously considered – sometimes “a change is as good as a rest” and a break from the normal routine would be good for you and for the person using our services.

Shared Lives South West will support you if you say you need to take a break and will help you to make suitable arrangements to support the person using our services. This might be by using your support carers, using the Shared Lives South West Short Break service or by us finding a peripatetic support carer for you. In some instances, the person using our services could take a break with their own family at the same time as your break and we would be happy to help you liaise with them on this matter.

You must give Shared Lives South West a minimum of two weeks notice in advance (except in an emergency) of any periods of time where you plan to be away from the home and intend to make alternative provision for the care, support and/or accommodation of the person using our services living with you.

Notification of breaks should be confirmed by the completion and submission of a holiday form.

## Planning your breaks

As part of their ongoing support and monitoring, your Shared Lives Coordinator will discuss taking breaks with you and try to agree on an individual basis how you can secure a break from your caring role.

Please refer to the respite policy for further details.

## Funding of breaks

Carer Respite is paid for by Shared Lives South West as an organisational cost.

Each Carer is allocated an annual allowance equivalent to two weeks of the fees they receive for each person they support.

This allowance is managed by Shared Lives South West and used to fund alternative placements, e.g. support carers, other Shared Lives Carers, other social care settings. Depending on the cost and availability of the alternative placement, Carers are able to achieve, on average, 14 days break per year.

To ensure that any costs associated to respite are being used to provide a break from the caring role, respite allowances will only be paid to alternative placement providers, not the main Carer.

Respite allowance may be used to cover other costs which enable the Carer to take a break, e.g. costs associated with developing Support Carers or costs associated to taking the person on holiday. Full details of acceptable uses of respite allowances can be found in the respite policy.

Respite allowances must be used within the financial year they relate to and cannot be carried forward. Any unused respite allowance, either at the end of the financial year or where the person being supported has left the placement, will be lost.

The respite allowance covers the whole financial year, so if all of the respite allowance is used and then either the person supported or Carer leaves the scheme before the end of the year, the Carer may be asked to repay a portion of the respite allowance.

In some instances, Carers may want to take more breaks from their caring role than their respite allowance can cover. In this situation they can reach an agreement with Shared Lives South West to fund the additional respite costs as a deduction from the fees due to them in future months.

In some extreme and unforeseen situations, such as the unexpected hospitalisation of the Carer, Shared Lives South West may choose to provide additional emergency respite. Emergency respite will only be provided if it is needed to prevent a placement breakdown and we have been unable to secure additional funding from the local authority.

# Arrangements for holidays with people who use our services

## Taking the person who uses our services on holiday

We think it is fantastic that so many of our Shared Lives Carers are able and willing to include the people who use our services in their family holidays and give people opportunities that they would otherwise not be able to have.

There are lots of different issues to think about when planning a holiday which will include the person using our service. We will take it as read that you have already taken into account the views and wishes of the person who uses our service and have come up with a holiday proposal that would work well for you and your family, as well as the person who uses our service.

Going on holiday, especially going abroad may have implications for a person who uses our service's benefits and therefore their ability to pay their agreed contribution to you. You need to think about your insurance cover as a Shared Lives Carer. You also need to be clear about who is going to be paying for what. If you are expecting the person who uses our service to pay, can they afford it and would they choose to do this with their money or something else?

You may also need to complete a holiday form for the person/people you support. The document can be found in the forms section.

## Benefits and going on holiday

If the person who uses our service is going to be out of the country (i.e. the UK) for more than 28 days we are required to notify the various benefits agency and it may well mean that their benefits will be reduced after the 28 days until they are back again. This means that after 28 days, they would not have the income to pay you their agreed contribution. The person who uses our service may have savings or disposable income to make up this gap.

If you are planning a trip abroad that would last more than 28 days, you must contact us at the earliest stage so we can let you know exactly what this might mean. Trips abroad for less than 28 days have no effect on benefits but see the note below about letting us know about holidays anyway!

## Insurance

In terms of insurance, your Shared Lives Plus Public Liability Insurance policy continues when you go on holiday in the UK or outside of the UK. Remember that this is only liability cover for your caring activities while abroad. It does not cover you for things like medical expenses, cancellation, lost luggage and so on. These need to be covered by normal travel insurance and you are recommended to take out travel insurance in respect of yourself and your family including the person who uses our service as a named individual. Your travel insurers may require information about medical conditions as part of their routine process.

## Who pays for what

In terms of who should pay for the holiday itself, you need to establish this right from the start. You need to be clear that the person who uses our service wants to go on holiday, especially if they are going to be asked to pay towards it. This is the sort of area where good records are important. Please refer to the 'Who pays for What?' guidance in the appendices.

# Arrangements for holidays with people who use our services

In broad terms, you are being paid by Shared Lives South West and the person who uses our service to provide accommodation, care and support – no matter where you are! So to a certain extent things like meals and your time spent on care and support during the holiday have already been paid for within the weekly fee. It would not be reasonable to ask the person who uses our service to pay for something they have already paid for.

However, we know that the cost of a holiday is on top of normal household bills, and your rent or mortgage for example, all still have to be paid. So it might be appropriate to ask the person using our services to save towards the 'extra' costs of their holiday over a number of weeks or months, as part of your overall support with budgeting and money. Bear in mind that most people using our services have limited personal income once they have paid their contribution to you for their Shared Lives service, and they may not be able to save much.

It might be that the person who uses our service has accumulated some funds and would like to spend it in this way.

**Each case will be slightly different and will need to be documented. If the person who uses our service has an appointee, you would need to discuss this with them. If you support someone who has a deputy, then you must follow their guidance on holidays.**

In summary, the key points are:

- The holiday must suit everyone and everyone must want to go.
- If you plan to go abroad for more than 28 days, you must contact Shared Lives South West well in advance.
- The person who uses our service should not be asked to pay again for things the fees already cover.
- It may be reasonable for the person who uses our service to contribute towards the extra costs, if they can afford to do so.
- The costs to the person who uses our service must be made clear at the outset and time allowed for saving up if necessary.
- Take out travel insurance with the person who uses our service as a named individual
- If in any doubt, discuss in advance with your Shared Lives Coordinator.

# Feedback, compliments and complaints

If things aren't working well for you or if you are worried about any aspect of your work then please do talk to your Shared Lives Coordinator. It might be that you don't feel you are getting on with the person you support or that there are difficulties with professionals involved.

If for any reason you would prefer to speak with someone other than your Shared Lives Coordinator you can contact the Team Leader for your area.

We can support you best when we know what's going on - so don't worry about 'bothering' us that's what we're here for! We also like to hear if we've got something right - a compliment goes a long way!

## If you don't tell us something is wrong we cannot try to put it right.

It is very important to everyone at Shared Lives that we have an open culture in which you can tell us what is working well and what isn't.

We work hard at listening to our carers, people who use our services and our staff because we want to keep improving what we do.

- We send out questionnaires
- We phone people and we visit people at home.
- These are all opportunities for you to tell us what you think.

## Complaints

If things have really gone awry we have a complaints procedure which you are welcome to use. There is an easy read version as well.

Complaints can be anonymous, informal or formal. They will be logged but only the formal written complaints follow a set process. The outcome of a formal complaint can be appealed.

## Carer's survey and other ways you can give feedback

Each year we send out separate surveys to carers and those that use our services to help us to understand the issues that you face. You can also raise issues of concern with your Shared Lives Coordinator at any time.

If for any reason you'd prefer to speak with someone other than your own Shared Lives Coordinator you are welcome to contact a Team Leader.

Alternatively, you might prefer to discuss things with another carer - that's why we encourage everyone to come along to the carer meetings we organise. Increasingly carers are organising their own local, informal meetings too and these can be a great source of support and advice.

**Details of how to make a compliment or a complaint are available on our carer resources webpage.**

# Appendices

# Payment arrangements

## 1.1 Exit from the Service

1.1.1 Where there is a breakdown of the Shared Lives Placement, the Scheme may need to terminate the Service early. The Scheme will ensure that all options have been exhausted to prevent the breakdown of a Placement.

1.1.2 Where breakdown of a Placement is not avoidable;

- The Scheme will give the Council a minimum of 28 days' notice of the termination of a Placement. Where the Scheme can no longer ensure the safety and well-being of the person or the Shared Lives Carer, the Scheme may ask the Council to remove the person from the service with immediate effect, depending on the individual needs of the person and after taking into consideration the person's well-being.
- In the event of the Scheme terminating a Placement, the Council retains the responsibility to find a suitable alternative service. Where appropriate, the Scheme will work with the Council to identify an alternative Shared Lives arrangement either as a temporary or permanent Placement.

## 1.2 Changes to Placements

1.2.1 The Council will continue to pay the care and support payment for up to one week following the death of the individual where they had been living in a long term Shared Lives placement.

1.2.2 The Council will continue to pay the care and support payment for up to a maximum of four weeks where an individual is in a long term placement and is expected to return to the Shared Lives placement as their home after a hospital admission.

1.2.3 Currently Devon will pay a further two weeks at 80% of the care and support together with Rent & Household costs.

1.2.4 In any case where a placement ends early and the person is liable to cover the rent element of their service and the Council will ensure the Shared Lives Carer receives the full fee due.

1.2.5 Where a band level re-assessment has taken place this may increase or decrease the fee payable.

# Tax & National Insurance for Shared Lives Carers

As a Shared Lives Carer you are self-employed and are responsible for your own tax and national insurance.

*Please see the [Tax factsheet on the carer resources page on our website.](#)*