



Indicative Budget Tool V1.0

Document	Indicative Budget Tool
Purpose	Step by step process of how to use the indicative budget tool
Version	V1.0
Owner	ICT Business Transformation Team
Last Updated	13/01/2023

How to find the Indicative Budget Tool

1. The Indicative Budget Tool provides a lower and higher threshold of cost relating to the requirements of care.
2. Locate the relevant **Case Record > Menu > Related Items > Forms (Case)**.

The screenshot shows the Caredirector interface for a case record. The breadcrumb path is highlighted: **Case: Test, Jayne - (06/06/1996) [CAS-000001-2056]**. Below this, the 'Menu' button is circled with a red box and the number 1. The 'Related Items' button is circled with a red box and the number 2. The 'Forms (Case)' button is circled with a red box and the number 3.

3. Once selected, it shows a list view of all available **Forms** for this **Case**. To create a new indicative budget tool form, select **create new record** from the toolbar.

The screenshot shows the 'Forms (Case)' list view. The toolbar at the top left contains a red box with a plus sign and the number 4, indicating the 'create new record' button.

<input type="checkbox"/>	Due Date	Form Type	Start Date	Status	Responsible User	Responsible Team	Completed By
<input type="checkbox"/>	15/02/2023	Adult Conversation Record	06/01/2023	In Progress	Sarah Coupland-Jenkins	CD V6 Team	
<input type="checkbox"/>	10/02/2023	Adult Conversation Record	03/01/2023	Closed	Sarah Coupland-Jenkins	CD V6 Team	Sarah Coupland-Jen

4. Under **Form Type** select **Indicative Budget Tool**. Then select **Save**.

The screenshot shows the 'Form (Case): New' creation form. The 'Form Type' dropdown is circled with a red box and the number 1, showing 'Indicative Budget Tool' selected. The 'Save' button in the top left toolbar is circled with a red box and the number 2.

General

Case *
Test, Jayne - (06/06/1996) [CAS-000001-2056]

Responsible Team *
CD V6 Team

Form Type *
Indicative Budget Tool

Responsible User

Status *
In Progress

Due Date

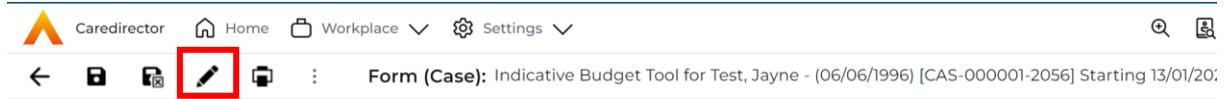
Start Date *
13/01/2023

Review Date

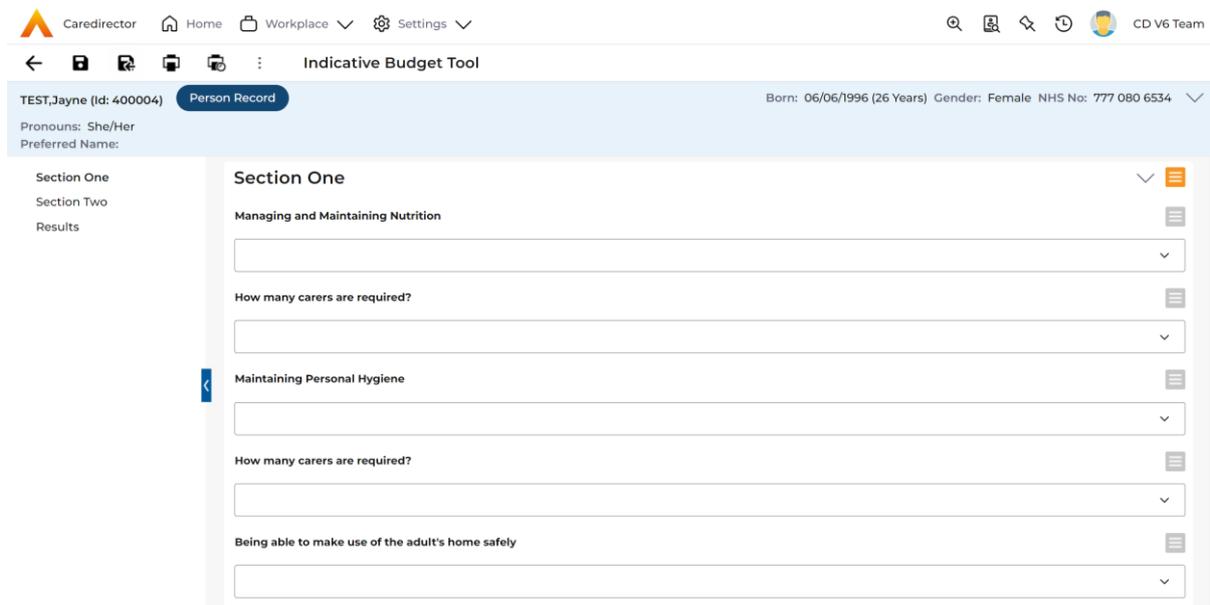
Preceding Form

How to complete the Indicative Budget Tool Form

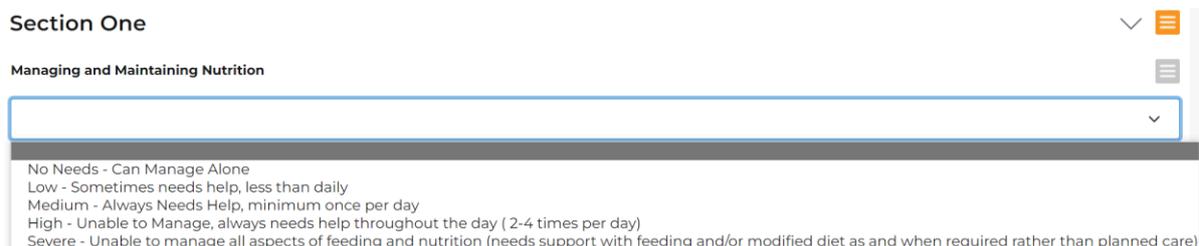
1. Once saved, a pencil (edit) icon will appear on the toolbar. Select it.



2. This will open the **Indicative Budget Tool** form for you to complete.



3. The form is split into three sections. Section one, the first question asks for **Managing and Maintaining Nutrition**, this is based on what the needs are of the person. Select the box underneath the **bold** question to select the appropriate response.



4. Once selected, the next question is **how many carers are required?** Answer appropriately by using the dropdown box underneath.

Section One ▼ ☰

Managing and Maintaining Nutrition ☰

High - Unable to Manage, always needs help throughout the day (2-4 times per day) ▼

How many carers are required? ☰

 ▼

1
2
3
4
5

5. Repeat the process for the rest of the questions below until **Section two**.
6. **Section Two**, changes to **Yes or No** options within the dropdown box. Choose appropriately until you reach the final section, **Results**.

CAREDIRECTOR INDICATIVE BUDGET TOOL

Caredirector Home Workplace Settings

Indicative Budget Tool

TEST, Jayne (Id: 400004) Person Record Born: 06/06/1996 (26 Years) Gender: Female NHS No: 777 080 6534

Pronouns: She/Her Preferred Name:

Section One

Section Two

Results

High - Always needs help throughout the day (2-4 times per day)

How many carers are required?

2

Managing Toilet Needs

High - Always needs help throughout the day (2-4 times per day)

How many carers are required?

2

Maintaining a Habitable Home Environment

High - Always needs help throughout the day (2-4 times per day)

How many carers are required?

2

Being Appropriately Clothed

High - Always needs help throughout the day (2-4 times per day)

How many carers are required?

2

Making use of necessary facilities or services in the local community, including public transport, and recreational facilities or services

High - Regular support needed (e.g. 2-4 activities per week)

How many carers are required?

2

Section Two

Developing and maintaining family or other personal relationships

Yes

Accessing and engaging in work, training, education or volunteering

No

Carrying out any caring responsibilities the adult has for a child

No

Shopping

No

Results

Lower Threshold

296.57

Higher Threshold

741.42

7. The **results** section provides an estimate to what the lower threshold and higher threshold of charges applied for these options selected. The numbers listed are in £.

Results

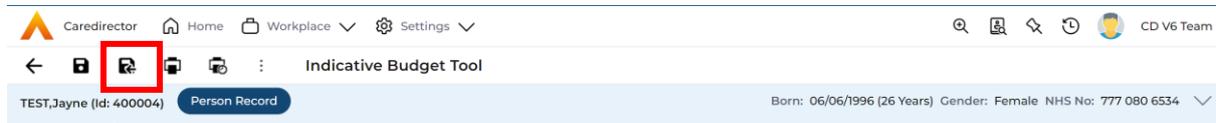
Lower Threshold

296.57

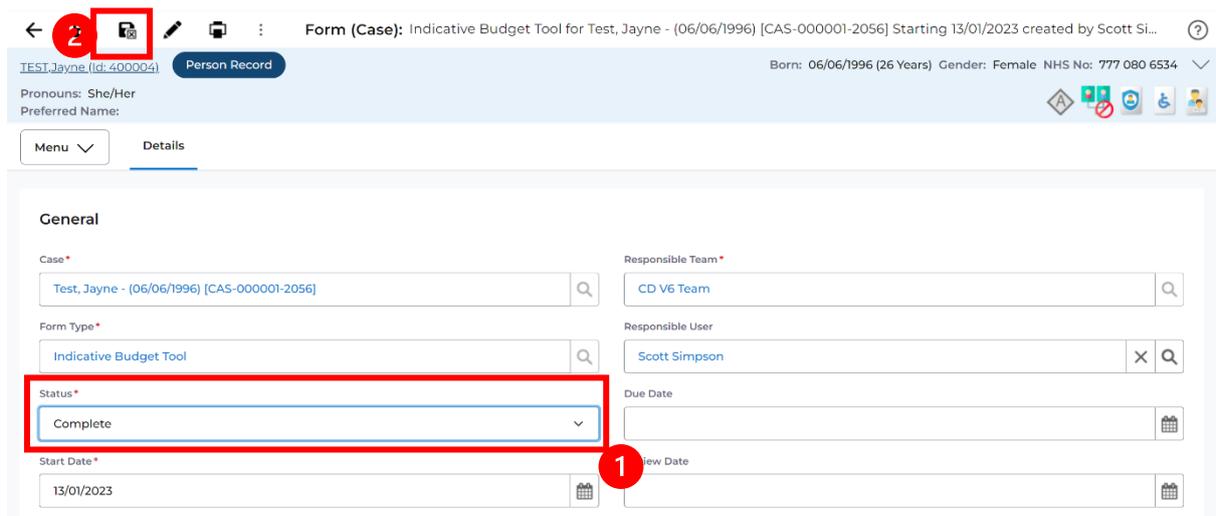
Higher Threshold

741.42

8. When finished, select **Save and Return to Previous Page** from the toolbar.



9. Change the **Status** of the form to **Complete**. Then select **Save**.



Version Control

Version Number	Change	Author	By Date
V1	Creation of document	SS	13/01/2023