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)**.

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.

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

How to complete the Indicative Budget Tool Form

1. Once saved, a pencil (edit) icon will appear on the toolbar. Select it.
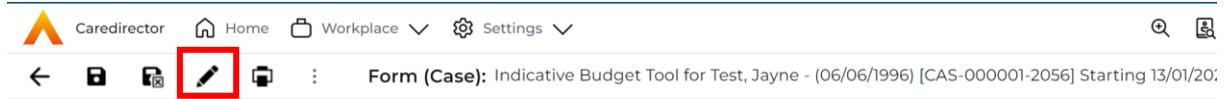
2. This will open the **Indicative Budget Tool** form for you to complete.
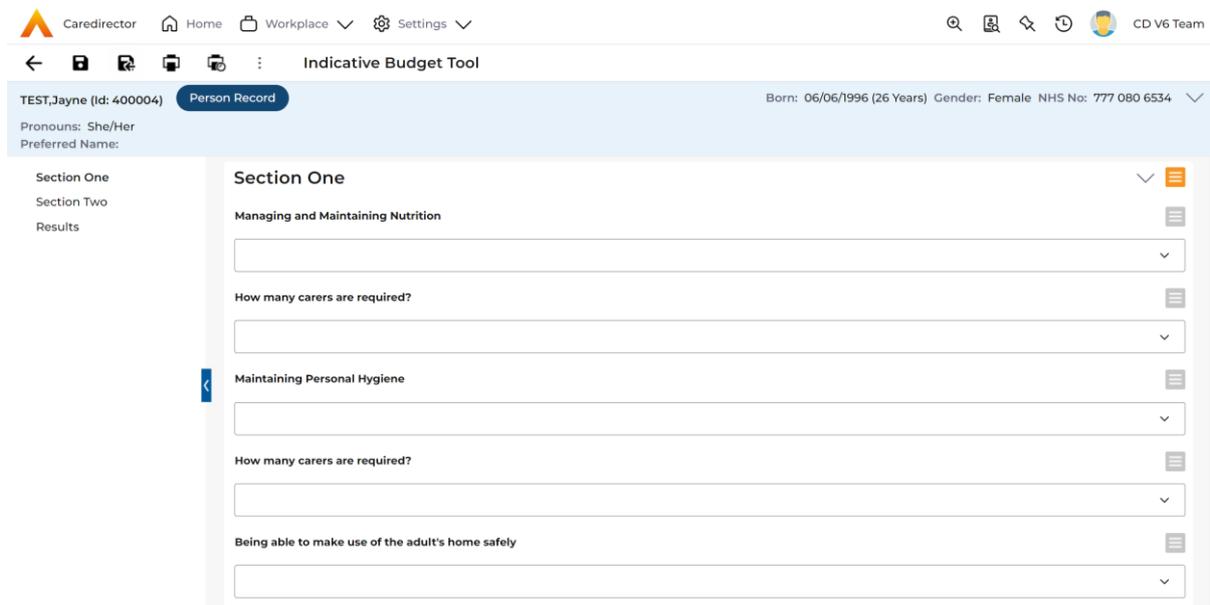
3. The form is split into three sections. Section one, the first question asks for **Managing and Maintaining Nutrition**, this is based on what the needs are of the person. Select the box underneath the **bold** question to select the appropriate response.
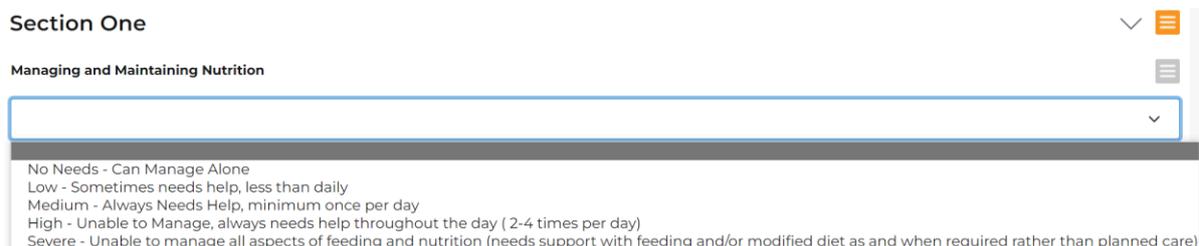
4. Once selected, the next question is **how many carers are required?** Answer appropriately by using the dropdown box underneath.

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.**

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 **£.**

8. When finished, select **Save and Return to Previous Page** from the toolbar.
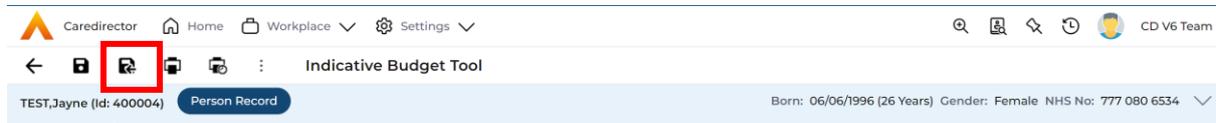
9. Change the **Status** of the form to **Complete**. Then select **Save.**
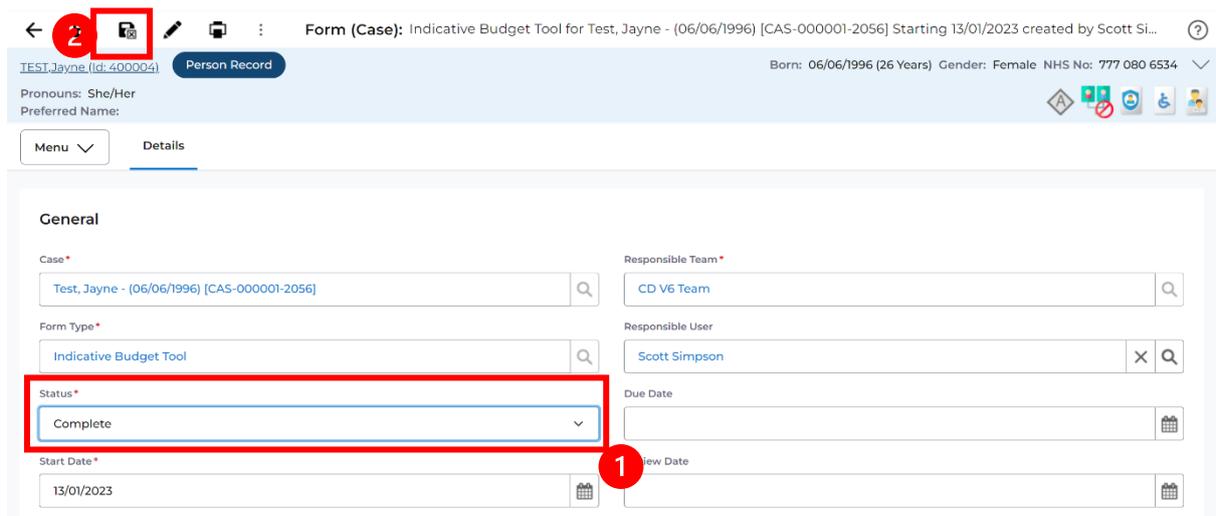
Version Control

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