

Personal Budgets and Social Care Payments

Requirements

- **Personal Budgets (PB) are a mandatory match** for applicable bodies. **Social Care (SC) payments are a voluntary match** for Local Authorities in England, Scotland and Wales only.
- Data submitted should meet this data specification i.e. include all field names
- Data should only be submitted via the Data File Upload (DFU) facility. This is now the only acceptable method to supply data. If another submission method is used our policy is to inform the Senior Responsible Officer/Director of Finance that data has been put at risk unnecessarily.
- For personal budgets and social care payments data should relate to recipients who are **over 18 years of age**.
- Social care payments are defined as payments made by local authorities for social care (excluding personal budgets paid as direct payments, or private residential care home costs as these are already matched in NFI). Social care payments may include, for example, payments for meals, carers, transport, home modifications, costs for council run care homes and equipment that helps with the tasks of daily living.
- **For personal budgets include data fields 1 to 19. For social care payments only include data fields 1 to 13.**
- Include only **current** recipients.
- Ensure that there is only one single record for each recipient. Where a recipient is in receipt of more than one type of social care payment they should only have one record in the data to be uploaded for matching. You will need to remove duplicate records.

| | Field name | Data format | Comments |
|------------|---|-------------|---|
| 1 (PB, SC) | Title | Character | e.g. Mr, Mrs, Ms, Dr, Sir, Cllr, Lord |
| 2 (PB, SC) | Forename(s) | Character | |
| 3 (PB, SC) | Middle name(s) or middle initial(s) | Character | |
| 4 (PB, SC) | Surname | Character | |
| 5 (PB, SC) | National Insurance Number | Character | It is important to provide this field where available in order to improve the quality of the data matching. |
| 6 (PB, SC) | Address line 1 | Character | |
| 7 (PB, SC) | Address line 2 | Character | |
| 8 (PB, SC) | Address line 3 | Character | |
| 9 (PB, SC) | Address line 4 | Character | |

| | | | |
|-------------|---|-----------|---|
| 10 (PB, SC) | Post code | Character | |
| 11 (PB, SC) | Date of birth | Date | |
| 12 (PB, SC) | Payment Start date (admission date) | Date | The date the payments started. |
| 13 (PB, SC) | Claim/Case Reference Number | Character | This should be the unique internal reference number. |
| 14 (PB) | Annual Amount Paid | Numeric | This should be the annual amount paid. Monetary amounts should be supplied without a £ sign and in the format of pounds and pence i.e. 12345.67 Please note: Monetary amounts must be supplied in the same format throughout the file. Records supplied as just pence (i.e. 123456) will be translated as £123456.00. If monetary values cannot be supplied, the field should be left blank. Please do not insert a zero. |
| 15 (PB) | Date the last personal budget direct payment was made | Date | |
| 16 (PB) | Housing Benefit Flag | Character | Include a 'Y' in this field to indicate that a personal budget recipient is in receipt of housing benefit. Otherwise leave blank. |
| 17 (PB) | Pensions Income Flag | Character | Include a 'Y' in this field to indicate that a personal budget recipient is in receipt of pensions income. Otherwise leave blank. |
| 18 (PB) | Unique Property Reference Number (UPRN) | Character | |
| 19 (PB) | Sex | Character | This must be 'M' for Male, 'F' for female or blank |