



IBK Offer and Price Guide (effective 1st April 2021)

Payroll Support

Annual Fees £378 (£31.50 per month)

Includes: Payroll processing for up to 8 PA's.

We offer a stand-alone payroll service to support individuals and families who wish to manage their own direct payment accounts.

- We will administrate the PAYE account.
- We offer a choice of PA hours submission, including paper or electronic timesheets, via email, post, hand delivery to office.
- We provide accessible timesheets to suit support needs.
- Our payroll processing and submissions are carried out throughout the month.
- We provide wage slips and distribute using a choice of formats; Email, paper copies or via secure payroll portal.
- We register and process PA starters, PA leavers and provide P45's.
- We complete monthly HMRC returns.
- We process end of year returns and provide P60's.
- We process PA annual leave, sickness and maternity/paternity entitlements.
- We administrate employer and employee pension contributions via NEST pensions.
- We ensure compliance with HMRC, Pensions Regulator and Local Authority.
- We issue monthly reminders to individuals/family regarding HMRC commitments and payroll deadlines.
- We offer flexible invoicing options; Monthly, quarterly, annually and a choice of payment method is available.
- We provide guidance, signposting (e.g., employer's liability insurance) and support with managing a direct payment account.
- We support with contacting Direct Payment Teams and Social Care in order to resolve direct payment issues (via telephone, attending meetings, by email or letter etc).
- We have a comprehensive guide to payroll processing available upon request.

We don't charge additional costs for new PA starters/leavers or amendments

Account Management Support

(Includes Payroll and Payment of Invoices)

£604.80 annual fees or £50.40 per month

Our account management support includes up to 4 payroll or invoice transactions within one calendar month.

- We aim to respond to any enquiry (for example; new referrals) within 48 hours, if urgent we will endeavour to respond within 24 hours.
- We use specialist accounting software to store and monitor each Direct Payment account within its own ledger.

- We ensure compliance with GDPR and Local Authority quality assurance requirements.
- We reconcile incoming and outgoing transactions daily to each managed account.
- We include PA payroll processing in our Account Management Support; *(Please see Payroll Support for details.)*
- We ensure support plans and Direct Payment agreements are received, checked and adhered to at all times.
- We carry out monthly checks on annual fees, i.e. PA holiday cover, pension contributions, employer's liability insurance.
- We manage payment transactions in accordance with support planning.
- We provide a balance or summary of a managed account upon request.
- We pay agreed care and support invoices twice weekly throughout the calendar month.
- We pay agreed Personal Assistant wage payments monthly.
- We submit PAYE returns and make HMRC payments in accordance with their deadlines and compliance.
- We action HMRC amendments immediately via our payroll system or within 48 hours if received via letter.
- We administrate Employer's Liability Insurance on an annual basis (or when required due to changes in support plan) and we work closely with the Insurance provider.
- We have access to discounted Insurance policies which can include HR and employment law advice/guidance and personal health budget cover.
- We monitor the direct payment account daily/weekly/4 weekly (dependent upon remittances, funding, expenditure) to ensure the integrity of funding and to ensure monies are available to cover care and support agreed.
- We aim to communicate concerns regarding direct payment funding within 48 hours, to the individual/family/Direct Payment teams and Social Care.
i.e. Missing funds/uplifts to support plans.
- We work closely with the individual/family, the Direct Payment audit team, and Social Care regarding return or retention of surplus funding.
- We investigate changes in Direct Payment funding (which can be as a result of a change in direct payment agreement or support plan or the allocation of a contribution) with Local Authority and individual/family as soon as these are identified.
- We follow up contribution payments with financial assessment teams and individuals/family as soon as we are aware that these have been allocated.
- We agree contribution payment plans and provide payment instructions and support.
- We monitor and reconcile contribution payments received.
- We issue reminders to individuals/family and re-iterate responsibilities for payment of contributions.
- We escalate missing contribution payments to the Direct Payment teams and Social Care, in accordance with SCC procedures.
- We provide managed account summaries to individuals/families on a bi-monthly basis (and upon request) which include PA holiday entitlement, a breakdown of support funds/hours, contributions paid/owed and management fees.
- We manage the closure of the direct payment account in accordance with the Direct Payment Audit team and Social Care and adhere to final monitoring procedures.
- We attend Social Care/CCG meetings, where our input is requested and relevant.
- We can arrange face to face or remote meetings on request, with SCC and/or individual/family to discuss the managed account.
- We ensure signposting and introduction to other organisations if individual/family require additional support.
- We can provide a comprehensive guide to managing a direct payment on request.

Family Account Support

(Includes Payroll Support and Payment of Invoices)

£828 Annual Fee (£69 Monthly)

Our family account support includes all the benefits of Account Management Support (*Please see Managed Account Support for details.*)

But in addition, can facilitate up to 3 family members (who are in receipt of direct payments) to be managed within one account – *subject to support plans.*

All direct payment funding will be managed, monitored and validated individually but stored under one ledger using our specialist accounting software

Individual accounting documentation is maintained at all times to ensure the integrity of each allocated budget.

All transactions are multiple and in accordance with each individual's direct payment and support plan;

- We manage the multiple direct payments being received.
- We follow the multiple, individual support plans.
- We manage the PA payroll processing from one PAYE account and all PA wages and HMRC are paid via this account.
- (*Please see Payroll Support for details of our payroll support.*)
- We provide the family with itemised PA wage slips which include the breakdown of hours worked by PA(s) with each family member (if appropriate).
- We manage and pay the multiple, individual care and support invoices.
- We manage the multiple contributions (if allocated.)
- We provide the family with a combined overview of each component where the support is provided individually.
- We liaise with the multiple Social Workers (if different workers are allocated to each family member.)
- We liaise with Adults and Children's teams (if family members are different age groups.)
- We provide a balance of account that shows SCC a combined account summary.
- We provide a clear breakdown upon request to differentiate between the individual budgets.

Contributions Contingency

£240 to be requested 4 weeks following escalation to SCC - If the contributions payment still remains in dispute.

Our contributions contingency covers the additional resources required to manage the account during these situations;

- If the individual/family disagree with the financial assessment and refuse to make contribution payments.
- If the individual/family suddenly stop paying their contribution.
- If the amount of contribution changes and the individual/family do not amend their payment plan.
- If there is an anomaly during the financial assessment process which results in a 100% deduction of direct payment funds.

- If the direct payment ceases and there are outstanding contributions that the individual/family refuse to pay.
- If there is a backdated closure of the account resulting in retrospective clawback of funds.

This funding will facilitate the additional liaison required with all parties concerned and includes communication by telephone, email, letter and attending meetings;

- Individual/family members
- Social Care
- Direct Payment teams
- Direct Payment Audit team
- Financial Assessment team
- Care and Support Providers
- Personal Assistants

PA Recruitment

£378 If IBK manage the direct payment account

If IBK don't manage the direct payment account, the fee is **£478**

(To cover the additional communication, meetings, information gathering and familiarisation that is required.)

We offer an individually tailored Personal Assistant recruitment and matching service to individuals and families.

- We know that recruiting a Personal Assistant can be a challenge but we are passionate and experienced in matching PA's.
- We look for people with a positive outlook and who understand how important the job of a PA is.
- Our service is led by the individual and we invest time into finding out exactly what would be a good match for them and their family.
- We include the person or family fully in our process so that they are empowered to make all of the decisions.
- We identify what the PA role is and compile an in-depth job description.
- We ensure that we understand the person's interests and passions to drive the marketing campaigns.
- We advertise and promote in creative ways to attract a diverse range of applicants.
- We attend local job fairs and events, recruiting from schools, universities and friends of friends who have heard how rewarding working as a PA.
- We co-ordinate candidate application forms and shortlist applicants.
- We match PAs with individuals/families who genuinely have things in common.
- We ensure they have the skills, qualifications and experience needed to do the job.
- We carry out a range of in-depth interviews, including; telephone, remote, face to face.
- We compile PA personal profiles of potential candidates to share with individuals/families.
- We fully support introductions between candidates and individual/family members either in person or remotely via video call.
- We complete DBS checks and collect employment and character references.
- We promote the support that PAs provide and assist the family in understanding their responsibilities as an employer

- We champion the benefits of being a good employer, signposting to any additional support needed; i.e. ACAS, Insurance provider, Skills for Care, training providers.
- Our relationship with the people we support is exceptional and is key to why our PA matching service is so successful.

Bespoke Packages of Support

Prices upon application

We are often approached to undertake more complex and bespoke packages. In these circumstances we assess and calculate the cost of providing this support based on the needs of the people involved. We are proud to be able to adapt the services we offer to meet the needs of individual families and to help families design a support package that suits their needs.

Examples of bespoke work include;

- Processing fortnightly or 4 weekly payrolls.
- Providing HMRC payment support and training.
- Coordinating and managing large or complex managed account packages, personal health or education budgets;
Support might include home visits and additional employment/timesheet support.
- Managing multiple funding streams, complex PA teams/invoicing and large budgets.
- Coordinating and sourcing specialised training for PA's;
Support might include monitoring the training/training refresher courses and paying the invoices.
- We coordinate staff and team supervisions and appraisals;
Support might include organising dates and venues, setting agendas, note taking and following up on agreed action points.
- We attend and contribute to CIN, EHCP and review meetings as required.
- We provide specialist advertisement and recruitment for complex young people.
- We support families with finalising PA contracts and job descriptions, liaising with employment law specialists to develop employment contracts that are robust and suit the needs of that family.
- We develop, coordinate and manage bespoke, specialised education packages for children and young people with high and complex special educational needs.
Support includes delivery of alternative non-directive education, liaison with schools and managing a team of tutors and education PA's.
- We deliver interventions for high needs young people who are not accessing education.
- We are a registered centre for delivery of National Open College Network (NOCN) accredited qualifications;
The flexibility within the vast and varied NOCN suite of available accredited courses, allows our learners to achieve qualifications they may not have achieved in a school-based setting.

We are currently developing a model of family support to help families make the most of the personalisation agenda. We hear so many families say they would love an individual budget but they are worried about becoming an employer and managing payroll etc. In order to address these issues, we are developing support for families that includes;

- Information, empowerment and planning workshops for parents.
- Networking events for families and PAs.