

Reference: FOI.ICB-2526/167

Subject: Personal Health Budget Support Services

I can confirm that the ICB does hold some of the information requested; please see responses below:

QUESTION	RESPONSE
Please refer to requesters template enclosed.	

The information provided in this response is accurate as of 11 September 2025 and has been approved for release by Rosi Shepherd, Chief Nursing Officer for NHS Bristol, North Somerset and South Gloucestershire ICB.

FOI regarding personal health budget (PHB) support services

Question	Response
1) Name of ICB	Bristol, North Somerset and South Gloucestershire (BNSSG)
2) For each place in the ICB which has a commissioned provider of PHB support services:	Partner to Care (PtC) is commissioned by Sirona Care and Health to provide PHB support for the BNSSG population.
a) provide a copy of the service specification	Enclosed
b) what is the contract value?	This forms part of a wider block contract for Adult Community services. As such we are unable to provide costings for individual services.
c) what are the contract start and end dates?	April 1st 2020-March 31st 2030
d) list all groups of patients who access the service eg people eligible for adult continuing care funding	Adults and Children eligible CHC
3) Give details of how PHB support and advice is provided in ICB places where there is no commissioned external provider of PHB support and advice	N/A - PtC commissioned
4) Give details of any frameworks which are used by patients to choose a PHB support and advice provider	No frameworks are used for PHB Support and Advice.
a) Provide service specifications which underpin the activities of the providers on the framework	N/A
5) How does the ICB provide independent advocacy advice to people who hold a PHB or wish to hold a PHB?	Not for Individual PHB service.
a) Provide any relevant service specifications	N/A
6) Are there any places in the ICB which do not have access to either a commissioned PHB support service or a framework for people to choose a provider from?	No
a) If the answer to 5 is yes please give details of how people will get their PHB support and advice and independent advocacy services	N/A

3.3.2.14 Partner to Care Service

3.3.2.15.1 *Aims and objectives of service*

The purpose of the service is to support individuals eligible for adult CHC or Children's Continuing Care to successfully operate a PHB care package by delivering the following:

- **Care and support planning** assistance for budget holders to create a care and support plan that captures what matters to them and all the necessary elements that would make the plan achievable and effective.
- **Brokerage assistance** to identify care providers that can be used to meet the individual's assessed care and support needs.
- **Recruitment support and training**, including leading or assisting with the recruitment of carers for budget holders. This may also work with the budget holder to ensure carers receive appropriate training.
- **Payroll support** to manage payments that a budget holder will need to make to carers, including managing tax, national insurance and pension contributions.
- **Advice and support** around employment issues that the budget holder may experience.
- **3 and 12 month reviews** of PHBs to ensure that the care package remains appropriate to the individual's assessed needs.

3.3.2.15.2 *Brokerage assistance*

Where the care plan identifies the requirement for traditional care agency input alongside personal assistants the Provider may be tasked with assisting the PHB budget holder in identifying suitable providers. In most cases this element of the care package will be identified by the ICB as a notional PHB, and brokered through the ICB's brokerage teams, but there may be occasions where it is more suitable for the Provider to undertake this function.

3.3.2.15.3 *Recruitment of personal assistants*

The Provider will support individual budget holders to recruit the personal assistants that will be tasked with meeting the care and support needs on the PHB care package. The Provider is given scope to develop recruitment practices in a way that will provide the greatest chances of success in recruiting personal assistants.

3.3.2.15.4 *Training for personal assistants*

3.3.2.15.4.1 The Provider will include within each care and support plan the training requirements for personal assistants employed on the care package. Also included may be the details of the training required by informal or unpaid carers, such as close family members who are not employed on the care package, but still perform care tasks.

3.3.2.15.4.2 The Provider will deliver training to personal assistants Face to Face within a classroom environment delivered bespoke to meet the patient's needs. Alternatively, where an existing commissioned NHS Provider is to deliver the training (e.g. sleep unit), to arrange the training delivery with this Provider.

3.3.2.15.4.3 The Provider will be expected to provide and/or sign post the Personal Assistant to the following training for personal assistants;

- E-learning and classroom practical sessions for a range of topics from health and safety, safeguarding to clinical practice;
- Review when requested by the ICB any requirement of refresher training needed which can be escalated to the ICB

3.3.2.15.5 *Payroll support*

3.3.2.15.5.1 An individual budget holder who employs personal assistants can choose to utilise the Provider's managed account service for payroll support. In this instance the Provider will undertake a range of tasks including, but not limited to the following:

- Liaising with PHB budget holders/nominated representatives to ensure that all personal assistants have signed employment contracts with the PHB budget holder.
- Setting up an individual PHB bank accounts so that PHB funds are held in discrete accounts.
- Providing useful tools for the PHB budget holder such as sample timesheets, annual leave and sickness reporting forms to use with their staff.
- Receiving, collating and checking completed timesheets submitted by PHB budget holders on a weekly/monthly basis.
- Facilitating payments to employed personal assistants, including appropriate pension and national insurance contributions, and tax deductions.
- Tracking PHB spend on individual accounts
- Identifying risks of overspend or inappropriate use of funds and escalating to the ICB

3.3.2.15.6 *Advice and support*

- 24 hour employer advice line (via the PHB holder's insurance provider)
- Assistance with any queries from PHB holders during working hours
- To work with the ICB in developing the Provider's role in supporting the PHB Budget holder with employment issues, such as facilitating medication and conflict resolution

3.3.2.15.7 *Reviews – three and twelve months*

3.3.2.15.7.1 The Provider will undertake a clinical review of the PHB holder and their care package initially at three months following the package starting, and then at twelve months. A further twelve month review will then be undertaken in each year that follows.

3.3.2.15.7.2 Where the ICB has indicated that a clinical review is required in advance of a planned review the Provider will ensure that it is undertaken within seven working days of request.

3.3.2.15.8 *Population covered*

The population to be covered is service users eligible for NHS Continuing Healthcare where BNSSG ICB is the responsible commissioner.

3.3.2.15.9 *Any acceptance and exclusion criteria and thresholds*

3.3.2.15.9.1 The service will be available to individuals who have been referred to the Provider by BNSSG ICB.

3.3.2.15.9.2 Exclusion Criteria:

- PHBs are only available for adult's eligible for CHC or children eligible for Children's Continuing Care who are to receive domiciliary care in their own home;
- Any eligible individual/nominated person/representative who is prevented from holding a PHB as detailed in the Schedule to the NHS (Direct Payments) Regulations 2013;
- Where a PHB is considered to be an impracticable or inappropriate way of securing NHS care for an individual e.g. specialised clinical care required or because a personal health budget would not represent value for money as any additional benefits to the individual would not outweigh the extra cost to the NHS. (As outlined in Guidance on the 'right to have' a Personal Health Budget in Adult NHS Continuing Healthcare and Children and Young People's Continuing Care 2014).

3.3.2.15.9.3 Application of the exclusion criteria will be undertaken by both the ICB and the Provider to maintain a robust financial and clinical approach.

3.3.2.15.9.4 There may be occasions whereby the individual is no longer CHC eligible but continuation of a PHB in line with the 'right to ask' may be considered the most appropriate way of securing services for this individual. In such cases the continuation of the Provider in this context will need to be discussed and agreed on an individual case basis with the ICB.

3.3.2.15.10 *Interdependence with other services/providers*

The Service Provider will work collaboratively with other NHS, social care and voluntary and community partners to ensure individuals receive a service that is accessible, easy to understand and compliments existing Providers for CHC eligible individuals.

3.3.2.15.11 *Operating hours*

The Provider will provide referral acceptance, PHB co-ordination and case management functions five days a week (Monday to Friday) during normal office hours (9am – 5pm), including lunchtime.