

# Personal Health Budgets for Mental Health Recovery

## Referral check list



### Things you need to submit a PHB referral:

- ✓ **Complete a PHB referral using the online referral form; <https://www.corearts.co.uk/phb-brokerage-service/>**

You will be expected to include:

- **A breakdown of all items/ activities requested** including name, supplier, cost, frequency (if applicable) with weblinks for each item.

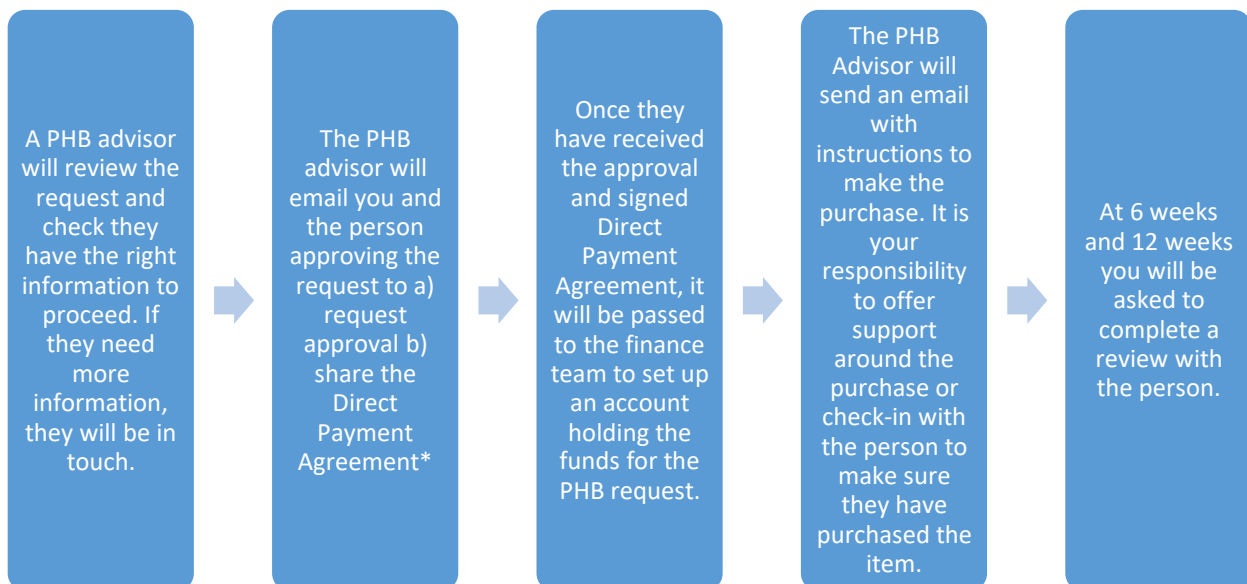
This information is used by Core Arts Brokerage Service to confirm the total budget amount and run financial checks once the PHB has been set up. The PHB request cannot be processed without this information.

- **The recovery goal description**, this is:
  - The person's mental health recovery goal
  - Why the person has selected the item/ activity to support this goal
  - Why this is important to the person e.g., why have they selected this over other options.

Each person is unique, this should be reflected in the above. You could write the recovery goal description following a conversation with the person or you could ask them to write something and share it with you.

- ✓ **If the request is £250 or over, approval from the team lead**
- ✓ **The PHB plan- this gets loaded to the PHB referral form**
  - It can be completed electronically or written and then scanned
  - The recovery goal and info will be the same as on the referral form (you can copy and paste)
  - This form should be completed with the person but this can be done over the phone if a face-to-face meeting isn't scheduled, either way, they should receive a copy.

### Steps after the PHB referral has been submitted:



\*Direct Payment Agreement (DPA)- this gets signed at the point of approval (not sooner). It can be completed over the phone if a face-to-face meeting is not scheduled but the person must understand what they are agreeing to and receive a copy.

**For more information contact [bonnie.studd@nhs.net/](mailto:bonnie.studd@nhs.net) 07436027771**

Please note from 1<sup>st</sup> September 2024 Core Arts brokerage service is working in Partnership with ELFT to process PHB's for referrers and individual budget holders. The PHB process will remain the same except some elements will be streamlined for continuous service.