

Personal Budgets

Personal Budgets (PB) is a mandatory match for applicable bodies, but will not be collected with the main 2020/21 exercise. The data will be collected to a different timetable and participants will be notified of this timetable in due course.

A personal budget is a direct allocation by a council of funding for an individual to spend on a support plan to meet an agreed set of social care needs.

Requirements

- In line with good practice when handling personal data, you are required to password protect each dataset once extracted from the relevant systems. If required refer to our guidance showing how to [password protect data \(PDF document\)](#).
- 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 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.
- Personal budget data should relate only to recipients who are over 18 years of age.
- Only include current recipients of personal budgets.

Personal Budgets (direct payments)

Field name	Data format	Comments
Title	Character	
Forename(s)	Character	
Middle name(s) or middle initial(s)	Character	
Surname	Character	
National Insurance Number	Character	It is important to provide this field where available in order to improve the quality of the data matching.
Address line 1	Character	
Address line 2	Character	
Address line 3	Character	
Address line 4	Character	

Field name	Data format	Comments
Post code	Character	
Date of birth	Date	
Payment Start date (admission date)	Date	The date the payments started.
Claim/Case Reference Number	Character	This should be the unique internal reference number.
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.
Date the last personal budget direct payment was made	Date	
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.
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.
Unique Property Reference Number (UPRN)	Character	
Sex	Character	This must be 'M' for Male, 'F' for female or blank