



Formulate for S117

Completing the key Needs Profile questions and running the calculation



These slides cover:

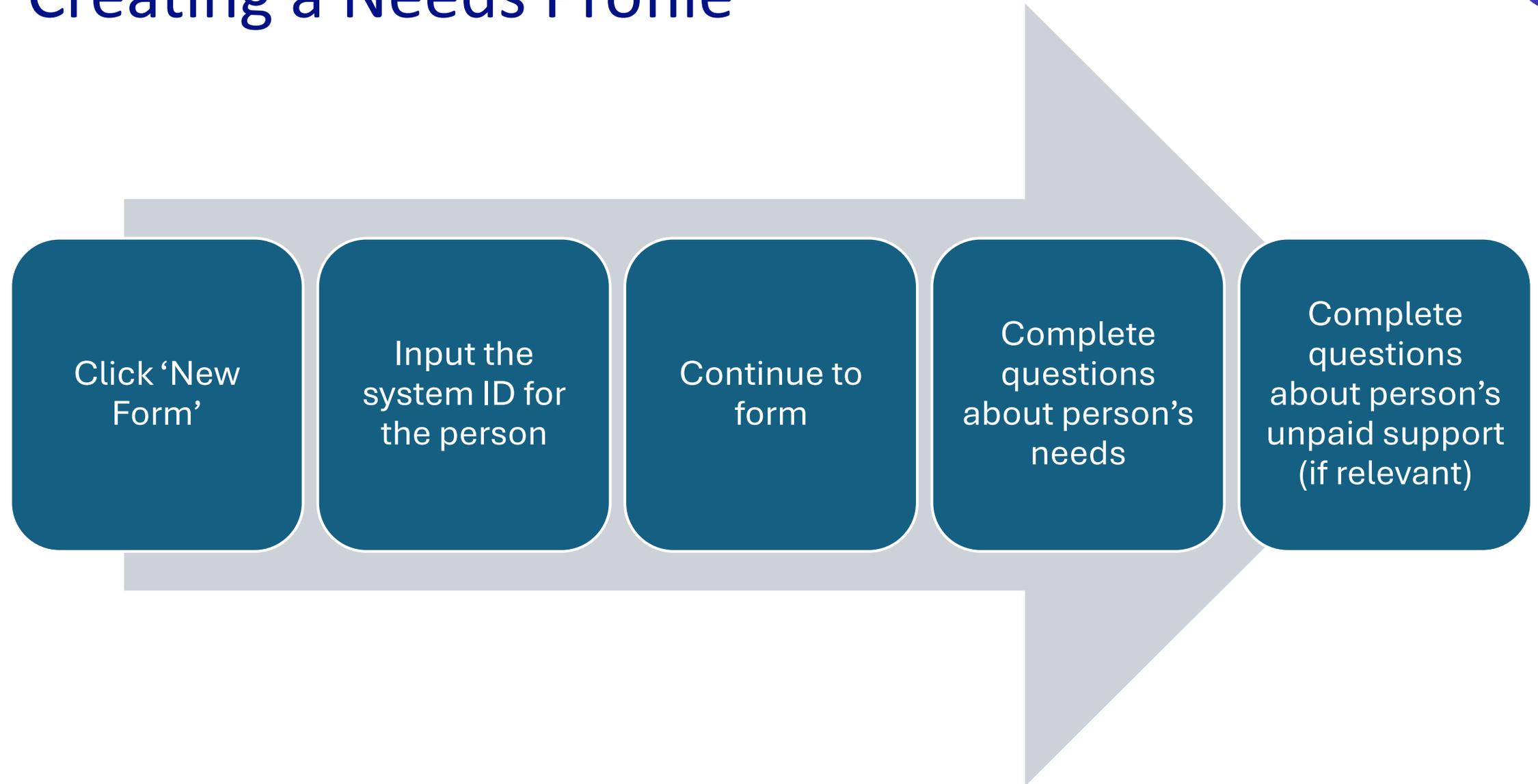
- What Formulate for Section 117 is and does
- How to use Formulate for Section 117 to create Needs Profile forms
- Key principles for completing the main questions accurately
- Calculating the Estimated Budget and Suggested Funding Split



What is Formulate for S117?

- Online software platform developed by Imosphere
- Decision-support framework to help with allocating Section 117 funding fairly, accurately, and consistently – while also:
 - Improving the process for agreeing what health and social care each pay
 - Contributing to better outcomes for service users

Creating a Needs Profile



Needs Profile – Key Principles – Needs/Risks (1)



- **'Day-to-day activities' and 'Personal care' sections**
 - Tick the activities the person can't manage by themselves
 - 'How often' questions
 - This is total support from either unpaid or paid carers
 - Base on an average week (where possible)
- **'Managing mental health' sections**
 - 'Wellbeing impact' and 'Engaging with support' questions
 - 5-point scale – base each answer on an average week
 - 'Additional support through the year' question
 - Occasionally / Regularly / Frequently – consider the most recent 12 months
- **'Medication' section**
 - Level of support typically needed for regular medication & how often in an average week
 - Separately record how often for specialist medication (e.g. weekly, monthly, as needed)

Needs Profile – Key Principles – Needs/Risks (2)



- **Risk and staying safe section**

- Behaviour: 5-point scale for level of concern (based on last 3 months)
- Predictability: Usually predictable → Extremely unpredictable
- Risk indicated by evidence: 5-point scale (imagine no support is in place)
- Safety daytime: How often someone needs to be present during waking hours
- Safety night (2 x Qs): Level of support needed & how often per-night

- **'Social' section**

- Usual level of support needed for activities (Group, 1:1, 2:1, etc)
- How often in a typical week (social)
- How often in a typical week (work/education/training)
- How often in a typical week (help caring for any children)



Needs Profile – Key Principles – Living Situation

- **Ongoing living situation**

- Nature of ongoing accommodation (alone, with family, supported living, res/nursing, etc.)
- If in supported living/res/nursing – number of people sharing support

Needs Profile – Key Principles – Unpaid Support

- **'Screening question' (any ongoing unpaid support – yes or no)**

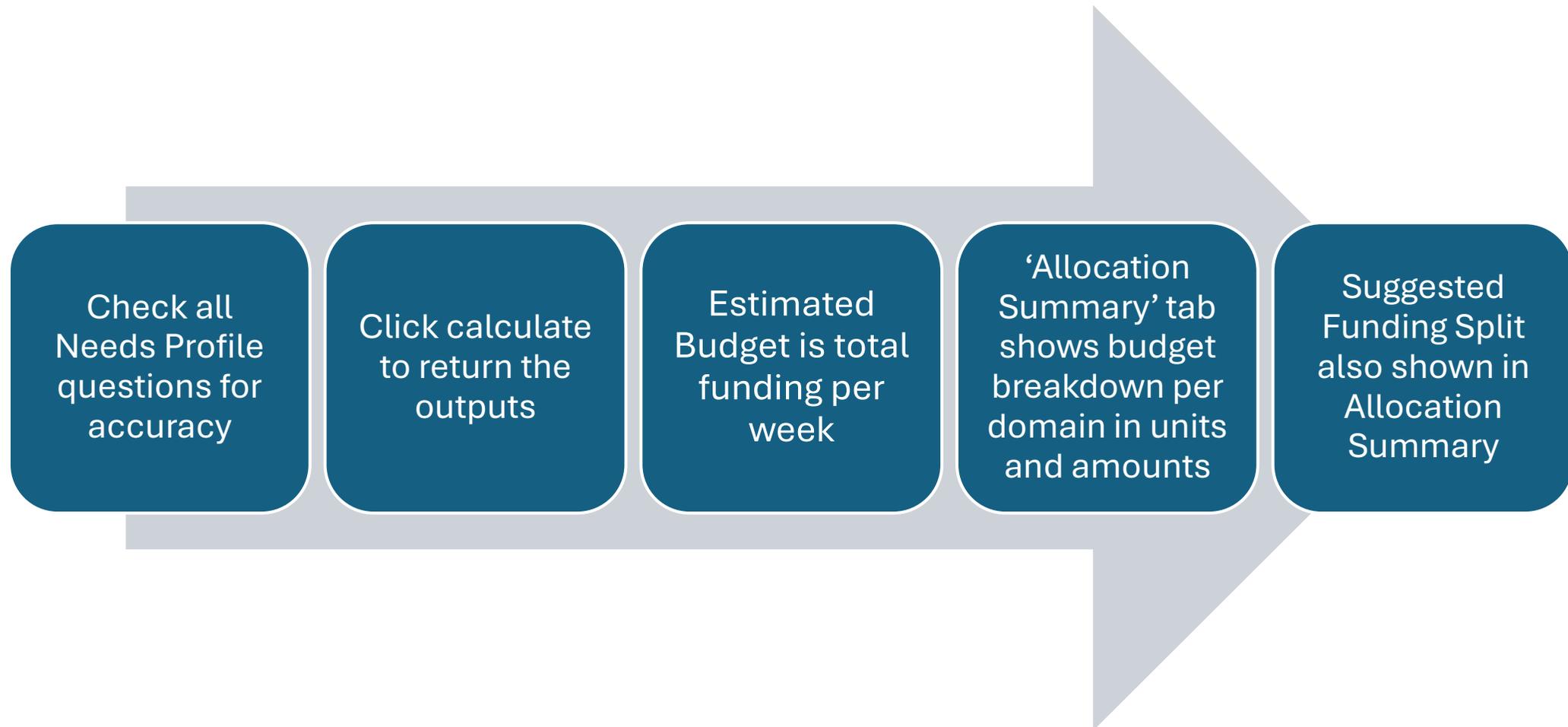
- If 'NO' – remaining questions auto-complete – and form is finished
- If 'YES' – complete remaining questions

- **Remaining questions – mixture of:**

- Checkboxes (tick if unpaid carer provides any **sustainable** support)
- Drop-downs (choose how much unpaid support is **sustainable** in a typical week)
 - Some are frequencies (e.g. once a week)
 - Others are proportions (e.g. most of the support needed)

These questions heavily influence the Estimated Budget – as any needs covered by unpaid support will not be part of the allocation.

Calculating Estimated Budgets & Funding Splits



IMPORTANT: Don't forget to finalise the Needs Profile form once you're done