

Self-Directed Support



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Self-Directed Support: An information and advice guide for families in Scotland. Self-Directed Support (SDS) is Scotland's approach to arranging social care that puts you in control. This guide explains how SDS works for adults and gives you the tools to access and manage support with confidence.

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1. What is Self-Directed Support?

Self-Directed Support (SDS) is the way social care is delivered in Scotland, giving people choice and control over the support they receive. Instead of the NHS simply assigning services, SDS lets you and your family plan and direct how support is provided. In simple terms, SDS means you get a say in your care. It's based on the Social Care (Self-Directed Support) (Scotland) Act 2013, a law that requires NHS to offer people more control with four flexible options for arranging support.

SDS is available to children, adults, and unpaid carers – anyone in Scotland who is assessed as needing social care services.

By law, NHS Social Work must treat you with dignity and respect, involve you in decisions, and offer you four choices for how your support is arranged. We explain the four SDS options in Section 5.

With SDS, you can arrange some or all your support instead of just accepting services the NHS arranges. This can lead to more flexibility to suit your family's life.

SDS is not a welfare benefit and it won't affect any benefits you receive. It is a fund for your care needs. The NHS allocates money to pay for the support you require day-to-day. They will let you know what the budget is and what it can be used for based on the support plan you agree on. You'll then have control to spend that budget on approved support that meets your needs.

2. How can I access Self-Directed Support?

Accessing SDS involves getting an assessment of your needs from your NHS Social Work if you are an adult, or the local authority if you are a child, and then choosing how you want your support arranged.

Here is a step-by-step guide:

2.1 Identify the Need for Support: If you or your loved one have difficulties with daily life due to disability, long-term illness, mental health, or other care needs, you may benefit from social care support. This could include help with personal care, getting out and about, respite breaks, etc. Make a list of areas where support is needed – these are your “needs” or the things that are hard to manage without help.

2.2 Contact the Social Work to Request an Assessment: Get in touch with your local social work department and ask for a care needs assessment. This may be called an Adult Community Care assessment. Section 4 of this guide has tips on how to ask, including a template letter. When you contact them, be clear that you are seeking support and mention that you are interested in Self-Directed Support. It is important to mention the urgency of your need for support. Often there are waiting lists for assessments and the assessment is the first step to access SDS.

2.3 Undergo an Assessment: A social worker or care assessor will meet with you to discuss your situation. They will ask about what you or the person you care for can and cannot do without help, and what outcomes (goals) you want to achieve. Be honest and thorough. You want to get across what the care needs are on a really bad day, not an average or good day.

This is the time to explain all the areas where support is required. It may help to keep a diary for a week or two before the assessment, noting daily tasks you struggle with, to show the social worker. The assessor will also consider your carer's needs if you are an unpaid carer. During the process of assessment, you are entitled to have a representative or advocate to support you.

2.4 Eligibility Decision: After the assessment, social work will decide if you are eligible for support. Each social work department has its own eligibility criteria to decide who qualifies. Typically, they look at how severe or critical your needs are. Don't be discouraged – many people do qualify, including adults who need help with daily living. If your needs meet the criteria, you are entitled to support through SDS. If not, the social worker should explain why and may direct you to other sources of help in the community. You can also ask for a reassessment if circumstances change.

2.5 Receive an SDS Offer and Budget: If you are eligible, you will be given an indicative budget – an estimate of how much money is available to meet your assessed needs. They must offer you the four SDS options for how this support is delivered. You should receive information about these options (see Section 5 for details) so you can make an informed choice. This offer and budget discussion is often done in a meeting or via a support plan draft.

2.6 Support Planning: Once you know your budget and choose a preferred SDS option, you, often with the social worker's help, will create a support plan. This is sometimes called a Personal Outcome Plan or just a care plan. The plan lists your outcomes and how you will use the budget to achieve them.

Step-by-step:

- Think about what services or assistance will meet your needs. For instance, will you hire a Personal Assistant, purchase services from an agency, or use community programs?
- The support plan will detail these and the costs. Don't worry, you can get help to write the plan – and you should only include support that you are comfortable with.

2.7 Approval of Plan: Social Work will review the support plan and approve the budget for the agreed support. They want to see the plan meets your assessed needs and that the costs are within the budget. This step is usually just a check to ensure everything is aligned; if there are issues, they'll discuss adjustments with you. Once approved, you move forward with arranging support.

2.8 Arrange Your Support: Now the exciting part – putting the plan into action. What you do here depends on which SDS option you chose (see section 5 for options).

- If you choose Option 1 (Direct Payment), the NHS will pay the agreed budget into a bank account (usually a separate account you set up for this). You then arrange the support yourself – for example, recruit a Personal Assistant (PA) or pay for services you outlined in the plan. You'll manage the money, so keep records of spending.
- If you choose Option 2 (Individual Service Fund), you will work with your chosen provider or the NHS, who will hold the budget. You pick the support you want, and they handle the payments. You still direct how it's used.

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- If you choose Option 3 (Social Work-Arranged), the social work department will organise services for you. For example, they might assign a care worker to visit your home on set days or arrange a day service. They handle the practical arrangements but should do so in line with your assessed needs and wishes.
 - If you choose Option 4 (Mix), you'll do some combination of the above for different parts of the plan.

2.9 Managing and Reviewing: Once support is in place, you will live your life with that support – but there are a few ongoing responsibilities. You should monitor how the support is working and keep an eye on the budget usage. The NHS will likely review your situation at intervals to ensure the support is meeting your outcomes. You can request a review yourself if circumstances change or if the plan isn't working well. Remember, SDS is flexible so you can switch options or adjust the plan if, for example, you find a different solution would work better.

Throughout this process, don't hesitate to ask questions.

If anything is unclear, ask the social worker to explain. The system can feel complex, but you have the right to understand what's happening.

You can also seek independent advice at any stage (there are free advice services and charities that help with SDS).

3. Who is eligible?

Eligibility means who can get social care support (and SDS) from the NHS.

In Scotland, any person, child or adult, with assessed care needs can be eligible – there is no age barrier. Children, adults, those in transition to adulthood, and carers can all get support under SDS if they need it. However, because resources are limited, NHS use eligibility criteria to target those with the greatest needs.

- **Children and Young People:** A child (or young person under 18) with disabilities or significant additional needs may be eligible for social care support.
- **Adults (18+):** Adults who have physical disabilities, learning disabilities, mental health conditions, long-term illnesses, or are older and frail may be eligible if those conditions mean they need help with daily living or staying safe and well. Typically, after an adult's community care assessment, the NHS uses eligibility criteria bands like low, moderate, substantial, critical needs. If you're an adult seeking support, be prepared to discuss how not having help affects your daily life.
- **Unpaid Carers:** Unpaid carers (for example, a parent caring for a disabled child, or an adult caring for their spouse or relative) can also have their own support needs assessed. Under the Carers (Scotland) Act 2016, carers are entitled to an Adult Carer Support Plan (or Young Carer Statement for young carers) to identify their needs as a career. If a carer's needs meet local eligibility criteria for support, they too can get SDS – often this might be in the form of services or a budget to help them take a break, called respite, or maintain their wellbeing.

For example, as a carer you might get an SDS budget to pay for someone to come sit with your loved one while you have time off, or to fund a short holiday break for you. It's important to note many carers don't recognise they have a right to support – but they do, and SDS applies to them as well.

Each authority sets its own detailed criteria for who gets support. They will consider factors like:

- Can the person manage personal care on their own?
- Are they able to get out of the house independently?
- Is the carer getting enough rest?

Based on the assessment, social work decides if the needs are great enough to be eligible for funded support. If they are, you are eligible for SDS. If not, social work should still give advice. They might say your needs are below their threshold and in that case, you may need to look at community services or try again if things change. Everyone has the right to at least be assessed – so even if you're unsure if you qualify, it's worth asking for an assessment.

Unlike some services, SDS support is not automatically means tested. The assessment for eligibility is about your care needs, not your income. That said, NHS can apply a financial assessment after deciding you are eligible, to determine if you should contribute to the cost. For example, most NHS have policies where adults with income above a certain level pay a contribution for care. For children's services, there is generally no charge to families.

Each NHS differs on charging, but the decision of whether you get support is based on need, not ability to pay. If any charges apply, they will inform you separately. In Scotland, personal care for adults is free if over 65; for under 65, some charges might apply for certain services.

If you believe you or your child needs help, you should request an assessment regardless of income or diagnosis. The law says everyone has a right to an assessment.

The worst that can happen is they find you're not eligible. Even then, they must explain and ideally point you to other help. If your needs change, you can ask again.

Being persistent and clear about the support you need is key. Do not be afraid to be assertive in explaining your family's situation and what things you find difficult.

4. How do I ask my social work department for support?

Approaching Social Work for help can feel daunting, but you have the right to ask for support and an assessment.

Here's how to go about it and make your case clearly:

Find the Right Contact: Each NHS in Scotland has a social work department or Health and Social Care Partnership. You can start by calling the main social work contact number for your area (see Section 7 for a list of contact details). When you call, say that you want to request an assessment for care or support needs.

If it's for your child, ask for the Children and Families social work team; if for an adult, ask for Adult social care services. You can also request a carer's assessment if you are an unpaid carer. Many NHS services have a dedicated phone line for new referrals, some have a "Social Care Direct" hotline. Tip: If phone calls are difficult, you can email the social work department or even write a letter – what's important is to make the request. We've included a template letter below.

What to Say: Be prepared to explain why you're asking for help. You don't need a long story at this stage – just a summary of the main issues. For example: *"I'm calling to request an assessment for my 10-year-old child who has autism. We're struggling to manage his care needs at home, and he needs support to take part in activities."* Or *"I am an unpaid carer for my mother, and I'd like an assessment for support – I'm finding it hard to cope on my own."* The key points to convey are who needs help, you or your child or family member, what difficulties or needs you have, and that you understand the NHS can provide social care support. You can mention Self-Directed Support specifically, *"I'd like to explore Self-Directed Support options for my family."*

Be Assertive and Clear: It's important to communicate clearly and confidently. You might say, *"I believe I/my child has needs that meet the criteria for support, and I'd like an assessment to discuss these."* If the person you speak to tries to deflect, for instance, asking if you've tried other services first, you can politely insist: *"Our needs are significant, and I would like a formal assessment. I understand I have a right to be assessed for care services."* Remember, social work have a duty to assess anyone who appears to need care services. You do not need to already be in crisis to ask – early help can prevent things from getting worse.

Request in Writing (if needed): Some people prefer to make the request in writing so there's a record. A written request can be via email or letter to the social work department. Provide your name, address, contact, and a brief description of the situation and the fact you are requesting an assessment under the Social Work (Scotland) Act (for adults) or Children (Scotland) Act (for children) for the purpose of Self-Directed Support. We've provided a template letter in this guide that you can adapt.

Keep Notes: If you call, note down the date, the name of the person you spoke to, and a summary of their response. If they say someone will call you back or they'll send out a form, mark that down. If you don't hear back in a reasonable time, follow up with another call or a written reminder. Being politely persistent can be necessary and busy departments might need a nudge.

Prepare for the Assessment Meeting: Once your request is received, you should be given an appointment or visit for the assessment. While you wait, start preparing and gather any relevant information like medical letters or school reports for a child that show needs, and perhaps jot down key points you want to tell the social worker. Section 2 of this guide (Step 3) already covered what to think about. You can also ask if there's anything you should have ready. It's your right to have someone with you during assessment if you wish. A family member, friend, or an advocate can be present to support you and help communicate.

If You Face Barriers: Sometimes people encounter gatekeeping. For example, a receptionist might say “we’re very busy” or “we’ll send you some information first.” If you feel you’re not being taken seriously, calmly reiterate your request. If necessary, ask to speak to a senior person or the duty social worker. You can also contact your local councillor or MSP if you continually cannot get an assessment, but this is rarely needed. Usually, asking firmly and following up suffices.

Know Your Rights: It helps to mention that you are aware of SDS and your rights. For instance, you could say: *“I understand the Self-Directed Support Act means I have choices in how support is provided. But first I need an assessment to identify what support is needed.”* This signals that you are an informed individual and people might then be less likely to give you the runaround. It’s unfortunate, but showing you know the system can sometimes get you quicker results.

Remember that asking for help is okay. Social work services exist to support the public. You are not “bothering” them – it is their job to assess and assist. Many parents and carers feel guilty or nervous when contacting authorities. Try to overcome that and speak as confidently as you can about what you or your child needs. If writing, keep the tone respectful but clear that you do need support.

On the next page is a sample letter you can use to request an assessment from your Social Work Department.

You can copy and fill in the details relevant to you. Sending this by email or post to the social work department will formally register your request.

[Your Name]
[Your Address]
[Your City/Town]
[Postcode]
[Your Phone Number]
[Your Email Address]

[Date]

[Head of Social Work Services]
[Local Authority Name] NHS [Social Work Department Address]
[City, Postcode]

Dear Sir/Madam,

****Re: Request for Care Needs Assessment for [Yourself/Your Child] under Self-Directed Support****

I am writing to request a social care needs assessment for [me/family member], in order to access support through Self-Directed Support (SDS).

****Reason for Request: ****[Provide a brief description of the situation and needs. For example: "My 15-year-old son has cerebral palsy and requires assistance with most daily activities. I am finding it increasingly difficult to care for him without additional support, especially as he is getting older. We are seeking support to help with his personal care and to allow him to engage in social activities." OR "I am 67 years old and living with arthritis and failing eyesight. I am struggling with personal care and mobility at home. I would like to be assessed for support services to help me remain independent."].

I understand that under the Social Care (Self-directed Support) (Scotland) Act 2013, I have the right to be offered Self-Directed Support options if I am assessed as eligible for care. I believe that [I/my child] have significant needs that merit an assessment.

I am keen to work with the assessment team to identify the support that will best meet [my/my child's] needs and to explore the SDS options available.

Please let me know when an assessment can be arranged. I am available to discuss this by phone or email; my contact details are provided above. I would also appreciate information on anything I should prepare or any forms I need to fill out in advance.

Thank you for your attention to this request. I look forward to your response.

Yours faithfully,

[Your Name]

Using the Template:

Fill in the blanks with your information and adjust the description to fit your circumstances.

- Keep it concise but do mention the key care needs.
- Make sure to date the letter and include how they can reach you.
- Once sent, the social work department should reply with confirmation and next steps (if you don't hear back in a couple of weeks, follow up by phone with the department to check they received it).

5. What are my options under SDS?

Under Self-Directed Support, you have four options for how your support is provided.

These options are the core of SDS and range from you taking a direct payment to the NHS arranging everything. You can choose the one that best fits your situation and this can be reviewed or changed over time if needed.

Option 1: Direct Payment – “Direct Payment” means NHS gives you the money to arrange your own support. You or your representative receive the allocated budget as a cash payment, and you take responsibility for purchasing the care or support services you need. This option gives you the most choice and control. You can hire your own staff often called Personal Assistants or PAs, pay a care agency of your choice, or even buy equipment or community activities. As long as it meets the agreed outcomes in your support plan. With this flexibility comes responsibility.

You must manage the money, keep records, and ensure the support meets your needs. You can pay a company to do a lot of the admin for you.

Option 2: Directing Support (Individual Service Fund) – Under Option 2, you choose your support and have as much control as Option 1 in deciding what you want, but you don't handle the money directly. Instead, the NHS or a third-party organisation like Centred, holds the budget for you and pays for the services as you direct. This is often called an Individual Service Fund (ISF). Option 2 can be a good choice if you want freedom to select and schedule services but prefer not to deal with financial paperwork. You remain involved in all decisions about what support you get, but you avoid being the employer or bookkeeper.

Option 3: Council-Arranged Services – This is the more traditional route where the social work department arranges and provides your services directly. Essentially, you ask NHS to take charge of organising your support package. They might assign NHS-employed home care workers, a place at a day centre, respite care in a facility, or other services that NHS contracts. You will have discussed your needs in the assessment and planning, but after that, the scheduling and management of staff is handled for you.

Option 4: Combination of Options – Option 4 is essentially mix and match. You can use a combination of the other options for different aspects of your support. You might take a Direct Payment (Option 1) for one part of the plan like hiring a Personal Assistant for evening help while also using council-arranged services (Option 3) for another part like attending a council-run day service. You could also have another service via Option 2. This option acknowledges that one size may not fit all – you can customise which approach works for each part of your support.

When you're offered these options, the social worker should explain each one clearly and how it could work for you. Feel free to ask questions like:

"What would Option 2 look like in my case?"

"Can I switch later if Option 1 is too hard to manage?"

By law, the explanation must be impartial – you shouldn't be steered unfairly to one option. The choice is yours, as long as the option is appropriate. They will assess if you or your representative can manage a Direct Payment, for example, but with support, most people can. If the person needing support lacks capacity to choose or manage (for example, a very young child or an adult with severe cognitive impairment), they are still entitled to SDS. In such cases, a guardian or representative can choose the SDS option and manage it for them.

Choosing an option is not necessarily permanent. You can change your mind. For example, if you start with Option 3 but later decide you want more flexibility, you can request to move to an Option 1 or 2 (and vice versa). Just communicate with your social worker.

SDS is meant to be flexible.

6. Top tips for managing SDS

Communication is Key: Maintain good communication with your social worker or SDS Advisor. Let them know if things are going well or if there are problems. If your PA quits and you're struggling to find a replacement, inform Social Work – they might offer temporary help or extend deadlines for spending the budget. If you don't use all the money immediately because maybe you're saving for a piece of equipment, let them know the plan so they understand unspent funds are earmarked. Being proactive and transparent builds a positive relationship. Also, don't hesitate to ask the social work department questions about procedures, such as: *"How do I submit my financial returns?"* or *"When is my support review due?"*. It shows you're on top of things.

Assertiveness and Advocacy: If something isn't right, like the provided service is not meeting your needs, or NHS delays payments you should speak up promptly. You can write an email outlining the issue and what you'd like done or request a meeting. When voicing concerns, stick to facts and refer to your rights or the plan: *"According to my support plan, I should have 10 hours of support, but this week only 6 hours were delivered due to staff shortage. This is impacting me because... I need the full support in place or a suitable alternative."* Being assertive is about being firm and clear, not rude. If you feel you aren't being heard, involve an advocate or escalate to a manager. Remember, you are the expert on your own needs. It's okay to challenge decisions. Our Peer Support staff at our Discovery Colleges in Inverness or Wick can help you with this.

Keep Evidence of Outcomes: SDS is all about meeting outcomes. The goals set in your plan. It's useful to keep notes or evidence of how the support is benefiting you or your child. Maintain a short journal: *"With PA support, John attended swimming club twice this month, which has improved his confidence,"* or *"Since using the day service, mum's mobility has stabilised, and she is happier."* During review meetings, you can highlight these positives. Conversely, note any unmet needs: *"We planned for 4 outings a month but only managed 2 due to not having enough support – need to adjust plan."* This outcome-focused thinking helps ensure the support remains appropriate and can justify if you need to ask for more or different support.

7. Thinking about private funding for care and support?

Some people opt for private funding for their care and/or support services. Private funding basically means that you are responsible for funding and paying for your own care. You can employ a care and support service of your choice directly and sort out the financial arrangements yourself or with the help of your family if you have the funds for this.

Some individuals or their families may wish to pay for their own support in full or top up the amount that social services award them. It would be useful to consider if your needs are likely to change in the future. If this is the case, then the fees that you agreed in the first instance may change one day to accommodate your new care plan/needs.

It may therefore be a good idea to ask your local social work team for an assessment. They will be able to help you decide what type of care you need, consider possible future fees and help you if you or a family member are unable to make the arrangements. If you would like to speak to someone at Centred to discuss self-private funding, please contact the team closest to you (details at the back of this leaflet).

Centred's services and where we operate.

Centred offers support to individuals in the Inverness, Lochaber, Easter Ross and Caithness areas. Centred strives for excellence in the quality of care and support we provide including via the quality of staff we employ.

We offer personalised support to help you maintain your independence.

Each client has a personal plan designed specifically for them – whether it is help with meal preparation, medication management, getting out and about or maintaining contact with friends and relatives.

Centred follows safer recruitment practices which include background checks of all staff and volunteers. All staff receive regular support from their manager and follow comprehensive training programmes in line with Scottish Social Services Council guidelines.

8. Contact Information

Head Office

Unit 38, The Eastgate Centre

Inverness

IV2 3PP

T: 01463 236 507

Recovery Centre

Muirfield Lane

Inverness

IV2 4AX

T: 01463 716 600

Inverness Support Service & Discovery College

Unit 38, The Eastgate Centre

Inverness

IV2 3PP

T: 01463 241 009

Easter Ross Support Service

1B King Street

Invergordon

IV18 0DT

T: 01349 369 100

Lochaber Support Service

Apartment 5, Meall na Mara

Alma Road, Fort William

PH33 6HD

T: 01397 700 944

Caithness Support Service & Discovery College

The Wellington Centre

Airport Industrial Estate

Wick

KW14QS

T: 01955 463 002



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