

Bennachie Horizon CIC

Option 1 Timeline Checklist

Date

Step 1: Request Option 1

Tell your social worker you'd like your budget to be managed through Option 1.

This is usually done at your SDS assessment or review.

 **Typical timescale: Immediate — the request is noted on the day.**

Step 2: Needs Assessment & Budget Agreement

The social worker assesses your needs and calculates your indicative budget.

You should be told how the budget figure has been worked out.

 **Typical timescale: 2–6 weeks (depending on caseload and complexity).**

Step 3: Approval & Paperwork

The budget plan is reviewed internally (sometimes by a funding panel).

You may be asked to sign a support plan confirming how you'll use the money.

 **Typical timescale: 2–4 weeks.**

Step 4: Account Setup

You'll either be asked to open a dedicated bank account, or the council will issue a prepaid card account.

Bank details are shared with the council's finance team.

 **Typical timescale: 1–2 weeks (longer if paperwork is delayed).**

Step 5: First Payment Released

The council transfers the first instalment of your budget into the Option 1 account.

You can now pay invoices for services, activities, or support.

 **Typical timescale: 2–4 weeks after account setup.**

Step 6: Ongoing Monitoring

Every few months, you'll be asked to submit invoices and account statements.

This is to check the money is being used in line with your plan.

 **Typical frequency: quarterly reviews.**

Tip: Write the date each stage is completed in the right-hand column of your checklist. If too much time passes between steps, you'll know when to follow up.