

LIFEWISE

turning lives around

**AN INTRODUCTION
TO
INDIVIDUALISED
FUNDING**

Please contact our Individualised Funding team:

09 623 6569 or michelles@lifewise.org.nz

09 623 6563 or nataliec@lifewise.org.nz

Introduction to Lifewise

Lifewise is the community services division of Methodist Mission Northern. We have sponsored and delivered social services in the Auckland area for over 150 years.

Lifewise Homecare Services has delivered traditional personal care, household management and socialisation support to people with disabilities, injuries and older people for over 20 years. We currently employ over 200 support workers, of which 80% have a qualification in Home Based Support Services, and support over 1200 people within the community.

What does this experience mean?

Our history and background mean that we bring a lot of experience to support all our clients:

- Individualised strengths-based case management
- Experience in all aspects of support workers' recruitment and employment management
- Robust and effective support workers training and development experience including Home Based Support Services Qualifications – NZQA Foundation Level 2 and Core Competencies Level 3
- Information systems to manage support workers, schedules, invoicing and payroll
- Focus on continually reviewing and improving the quality of service delivery
- Certification to the New Zealand Home and Community Sector Standards
- Ready access to Human Resource and Financial/Accounting information

Lifewise and Individualised Funding

Lifewise, in conjunction with disabled people, has recognised that the traditional models have not met their needs.

Lifewise has now been an IF host provider since 2011. We work closely with our Individualised Funding clients to make sure that IF meets their needs. In addition to the expected minimum support for IF, we can also support you with payroll and/or recruitment support.

The Lifewise Homecare Services office is located at 227 Mt Eden Road, Mt Eden, AUCKLAND. The office is open from 7.30am-4.00pm Monday – Friday.

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What is Individualised Funding?

Individualised Funding allows disabled people, or their agents, to choose and employ the support workers they want to provide Personal Care, Household Management and Respite Care support.

Basically, it puts the decisions and control about their support back in the hands of the person or family who need it, and allows you to use your disability support funding in a way that is flexible and responsive.

What choices can I make with Individualised Funding?

If you have IF, you can:

- Choose your own IF host provider
- Choose and employ your own support workers
- Manage the payment and other employment aspects for your support workers
- Choose the rate of pay (within your budget)
- Manage how your disability support is delivered – the support you receive and when it happens

Lifewise offers you three levels of IF support, with different options and levels of support. All clients receive Service Level 1. Service Levels 2 and 3 give you options for managing payroll and/or engaging our help with support worker recruitment, and the costs associated with all these services comes out of your Individualised Funding Budget. We explain these levels in greater details on page 11.

How do I get Individualised Funding?

Contact Taikura Trust on 0800 TAIKURA or www.taikura.org.nz to organise an assessment by their Needs Assessment and Service Co-ordination Service (NASC).

Taikura Trust will make a service request to the host provider chosen by you (e.g. Lifewise). The host provider will contact you and organise a time to meet with you to discuss your IF allocation and to explain how we can support you. **Lifewise works with you and/or your agent to make sure you get the best possible outcomes.**

You will be allocated a personal budget, and we will help you to work out a plan to make the best use of your support.

Frequently Asked Questions

What can be funded?

Currently Individualised Funding can be used for Personal Care services, Household Management services, and Respite Care. You can also claim the costs relating to the employment of your support workers.

Some examples of Personal Care services:

- Bathing/showering
- Dressing/grooming
- Feeding
- Oral healthcare
- Toileting

Some examples of Household Management services:

- Meal preparation including: shopping, cooking, dishes and kitchen cleaning
- Laundry including washing, drying and ironing; bed making; cleaning including vacuuming, dusting, cleaning bathroom and toilet; and rubbish disposal
- Shopping for groceries or personal items
- NOT gardening and lawn mowing, or spring cleaning

Some examples of how Respite Care may be used:

- You may go and stay in a community respite facility for a short period of time
- A support worker may come and stay in your home while your usual carer takes a break
- A support worker may take you out on an excursion for a few hours to give your usual carer a break

Some examples of costs related to the employment of support workers:

- First Aid certificate/First Aid kit
- Costs for support worker only for entertainment when you are out e.g. movies, MOTAT
- Meal costs when out with you
- Mileage costs when taking you out (not for travel to/from work)
- Cost of taxi/bus fare
- Photocopying of employment related paperwork
- Cost of advertising for support workers

- Purchase of a laptop computer, and scanner/printer to administer IF (some limits apply, please phone us for more information)

What can't be funded?

At this time Individualised Funding CANNOT be used for:

- Day and/or vocational services programmes (although it can be used for personal care support you receive while at day and/or vocational services)
- Rehabilitation Services
- Supported Living
- Respite provided in Ministry of Health contracted facilities
- Residential Support
- Information and Advisory Services
- Equipment or Housing Modifications
- Child Development Services
- Behaviour Support Services
- Therapy (a one-off occasion can be paid if the therapists are training current support workers)

This is because there are other financial support streams available to assist with these. You can speak with Taikura Trust about access to these other kinds of financial support.

Who can I employ?

You can either employ someone directly, or you can choose to contract with them or the agency they work for. On pages 13-17 of this booklet we give you more information about becoming an employer.

Can I employ a member of my family?

You can employ a member of your extended family as long as they do not live in the same house as you. You are also not allowed to employ through Individualised Funding your spouse/partner, or your mother or your father. A support worker may live in the same house as you, but they cannot be a family member e.g. flatmate. Your agent cannot be paid to support you either.

How much should I pay someone I employ?

Typical pay rates for support workers are between \$19.00 (this is the minimum wage payable for care and support workers and you are not allowed to pay below this rate) and \$23.50. A support worker's pay rate must take into account their relevant qualifications, skills and experience.

However, you must also take into account costs like: holiday/sick leave, PAYE tax, KiwiSaver employer contribution, ACC levies, and the amount that Lifewise receives from your Individualised Funding if you choose to have Level 2 (payroll support) or Level 3 (recruitment and human resource support).

You have to also consider the other costs of employing a support person such as using services on a public holiday, paying mileage, purchasing rubber gloves, providing training etc.

Remember too that if you contract an agency to provide care, the hourly rate will be higher and therefore have an impact on your budget and the no. of hours you have available each week. You will also be charged for the time and distance the support worker spends travelling to you.

What am I responsible for?

As a person receiving Individualised Funding, you or your agent have some responsibilities. There are Ministry of Health contractual requirements that you will need to meet:

- To manage your personal budget
- To not to exceed the total value of the support allocated by the NASC (Taikura Trust); we cannot pay your support worker or reimburse you if you have used up your personal budget
- To promptly discuss any changes to the support services or any change in your needs
- To provide timely, accurate and verified information to enable us to invoice the MOH for reimbursement i.e. signed/dated timesheets or invoices
- To ensure the health and safety of your employees while working
- To act as a fair and reasonable employer
- To ensure you monitor the quality of the support provided

If you choose to manage your own payroll you will need to ensure that:

<https://www.ird.govt.nz/>

<http://www.health.govt.nz/your-health/services-and-support/disability-services/types-disability-support/individualised-funding>

- a. your budgeting does not exceed your available funds
- b. you meet employment/contracting requirements
- c. you are a good employer
- d. you meet the requirements of the Ministry of Health guidelines for IF use
- e. you pay ACC levies, Kiwisaver employer contribution, and PAYE tax for your employees

- f. you keep all records of the support provided and payments made to support worker(s) for at least seven years

What happens if I have a problem with someone I employ? How do I resolve disputes?

You should talk with your support worker as soon as possible and outline your concerns – always document these discussions. As a host provider, we can only make some general suggestions about the process of resolving disputes and support you to make sure you meet your legal requirements as an employer.

Employerline can also help you and is available 24/7 – 0800 466 301

Employment New Zealand has a great website too: <http://employersupport.co.nz/>

What are my responsibilities as an employer?

When you become a client of Lifewise, we offer support and resources to help you understand your responsibilities as an employer.

The Ministry of Business, Innovation and Employment (MBIE) has a lot of useful information on their website at <https://www.mbie.govt.nz/business-and-employment/employment-and-skills/>

- ‘How to Hire’: <https://www.employment.govt.nz/assets/Uploads/tools-and-resources/publications/64d1224f26/how-to-hire.pdf>

You also need to understand that for any support worker employed by you, your home is their workplace, and there are health and safety requirements that you must meet. Both WorkSafe NZ and ACC have more information about this:

- Info about paying ACC levies: <https://www.acc.co.nz/for-business/index>
- Info about preventing injuries in the home: <https://www.acc.co.nz/preventing-injury/trips-falls/?smooth-scroll=content-after-navs>
- Presentation to understand the Health and Safety in the Workplace Act: <https://worksafe.govt.nz/the-toolshed/tools/hswa-presentation/>

We strongly recommend that you spend some time browsing these websites and become familiar with your responsibilities regarding employment, and health and safety.

Do we have to fill in all the forms?

Yes, to legally employ people the correct documents need to be completed e.g. individual employment agreement, tax code declaration, Kiwisaver opt in/out etc.

The Ministry of Health also requires that a Service Agreement and a Service Delivery Plan are completed for every client – we will do this with you.

Can I pay mileage to my worker?

Yes, if they use their own car as part of their work i.e. shopping, doctors' visits, outings etc. IRD recommends paying a rate of no more than 72 cents per kilometre travelled, but you may choose to pay less. You may want to require your support worker to keep a log book as evidence of the kilometres travelled and the reason for travel.

You should not pay them to travel to work or to travel home from work.

You need to budget for these costs when deciding on a pay rate.

Can I just get the money paid to me?

Only if you provide evidence that you have registered with IRD as an employer or have a self-employed contractor providing your support and are willing to manage all the aspects of payroll, then you can invoice Lifewise for the costs of paying your worker.

Please follow these links and read the information carefully to understand your obligations if you manage your own payroll.

<https://www.ird.govt.nz/>

<http://www.health.govt.nz/your-health/services-and-support/disability-services/types-disability-support/individualised-funding>

How can I be sure I am employing the right person? (also see: Suggested Steps to Employ' on pg 15)

1. Interview them
2. Ask for, and check references from other places they have worked – if possible actually speak with a previous employer
3. Get a police check done – you will need to liaise with Lifewise to do this
4. You have the option to include a 90-day trial clause in their contract. This allows you to terminate the employment before 90 days are up, if necessary
5. If they are not a New Zealand resident, check that they have a current work visa

Can I have more than one worker?

Yes, as long as you are clear in their agreements about what hours they each work. It is good to have more than one worker if possible so you have someone available to cover your needs if one of them takes leave or is away sick. You will also need to consider the type of individual employment agreement they have (see pg 14 for more details).

You will need to be aware that if you choose Service Level 2 where Lifewise manages your payroll, then there will be a one-off set-up fee of \$27.60 incl GST per employee, plus a fortnightly payroll fee of \$3.45 incl GST per employee (or \$89.70 incl GST annually per employee). Both of these fees will be deducted from your individualised funding.

What happens to the money if I do not use all my hours?

The money is held by the Ministry of Health and needs to be used in the year it was allocated. Any unused money just stays with the Ministry of Health and is not rolled over to the next year's allocation. Talk with us if you are not sure how to best use your funding, or if you are having any difficulties with this.

Can I change the amount of support I use each week?

Yes, you have the flexibility to change how much you spend each week. However, you will need to ensure that you do not exceed the total budget you have been allocated. Lifewise will not make any payments for exceeded hours. You also need to consider the need for flexibility when negotiating the employment agreement with your support worker.

How can I manage my budget well?

Ask us to email you a copy of our IF calculator. This is an Excel spreadsheet that will help you to manage your budget and take into consideration all the costs involved. Contact us if ever you need help or have concerns.

What do I do if I require more support hours?

Contact Taikura Trust and ask to be reassessed. You will be required to provide evidence for the increase in your needs e.g. medical report, occupational therapist report – Taikura can advise you regarding this.

Can my workers contract to me?

Yes, as long as they meet the IRD requirements. You must sight that they have paperwork to show that they are completing an IR3 tax return and are paying withholding tax..

What if I am going overseas for a holiday, can I use IF overseas?

Sometimes yes but approval for this is required from the Ministry of Health. Please contact us as far as possible in advance of your travel so that we can seek this approval on your behalf. Up to 3 weeks overseas travel may be approved.

IF Levels and Costs

| | |
|--|---|
| <p style="text-align: center;">SERVICE LEVEL 1 PROVIDED BY LIFEWISE AS IF HOST</p> <ul style="list-style-type: none"> • Coaching • Networking • Development of Individual Service Delivery Plan • Monitoring of Service Delivery • Reporting to Ministry of Health • Invoicing MOH • Monitoring of hours delivered • Development of Contingency Plans • Information package including Individual Employment Agreement Template, IRD and Kiwi Saver information | <p>All IF clients have this service level.</p> |
| <p style="text-align: center;">SERVICE LEVEL 2 PROVIDED BY LIFEWISE</p> <p>Payroll Including:</p> <ul style="list-style-type: none"> • Wages • Income Tax • ACC Levies • KiwiSaver Contributions • Other payments such as Court Ordered payments • Payslips • Maintenance of leave balances: annual and sick | <p>There are additional costs for Service Level 2.</p> <p>In addition to the costs for Service Level 1 (which all IF clients receive), the costs are:</p> <p>\$27.60 incl GST set up fee per employee</p> <p>\$3.45 incl GST per fortnightly pay period</p> |
| <p style="text-align: center;">SERVICE LEVEL 3 PROVIDED BY LIFEWISE</p> <p>Employment of Support workers including:</p> <ul style="list-style-type: none"> • Advertising • Recruitment <p>Human Resource Expertise including:</p> <ul style="list-style-type: none"> • Legislation • Performance Management • Dispute Resolution | <p>The costs of Service Level 3 are dependent on what is required.</p> <p>We will discuss these costs with you.</p> |

Becoming an employer

When you become a client of Lifewise, as a host provider we offer support and resources to help you understand your responsibilities as an employer.

You must meet the legal requirements for payment of PAYE tax, ACC levies and KiwiSaver employer's contributions.

A useful guide is the Ministry of Business, Innovation and Employment's "How to Hire" booklet. You can access it online from: <https://www.employment.govt.nz/assets/Uploads/tools-and-resources/publications/64d1224f26/how-to-hire.pdf>

If you choose Service Level 2 we will manage your payroll. There is a small processing cost for this service each fortnight (see pg 11 for details).

If you choose Service Level 3, we can help with employment of support workers, including recruitment. The cost for this depends on what exactly we do to help you.

Employee forms

We have several forms available for you to use. You can submit these to us for processing if you have chosen to use us for your payroll, or use them as a template for your own systems.

You will be provided with a set of these forms when you join Lifewise, and you can also download them from our website at any time <http://www.lifewise.org.nz/services/health-disability-services/toolkit/>

Accessing the Toolkit requires a password = **craFR&cacesP**

The forms we provide are:

- Advice of employment form
- Examples of employment contracts (choose ONE)
- Example of a position description
- Support Worker Privacy Notice
- KiwiSaver deduction form (all employees must complete this)
- KiwiSaver opt-out form (employees choose whether or not to opt out)
- Tax Code declaration * we must have this otherwise your employee will be taxed using code ND which is a much higher rate than usual
- Weekly timesheet
- Holiday application form
- Resignation form

- Annual leave form
- Sick leave form

*The underlined forms must be returned to us before we can pay your employee(s)

Record keeping

It is your responsibility to keep detailed employment records; you must keep these for 7 years. These include showing what supports have been used, what costs were incurred, and who payments have been made to.

We recommend you keep a folder with all your IF paperwork/emails in it. If you are audited, MOH or IRD will ask for these records.

Annual Leave, Sick Leave, Bereavement Leave etc.

There are legal guidelines about how much leave your employees are allowed to have each year. Currently for the legal minimums are:

- four weeks annual leave in a twelve-month period (an employee may also cash up ONE week of their annual leave in any twelve-month period after being employed for twelve months)
- five days sick leave after being employed for six months
- three days bereavement leave after being employed for six months

Casual workers

A worker is considered casual if they are NOT expected to work regular hours every week. For these workers, their annual leave is paid out pro rata each week with their normal pay, instead of them being able to apply to have annual leave paid out when they take a holiday.

Permanent Part-time workers

A worker is considered permanent part-time if they ARE expected to work regular hours every week. For these workers, their annual leave accrues and they are able to apply to have annual leave paid out when they take a holiday.

When support workers resign

Support workers should notify you in writing when they resign. There is a template of the resignation form in your info pack that you can use.

If you have chosen Level 2 and Lifewise manage your payroll, we need to be informed in writing when one of your employees resigns or no longer works for you. The notification must include what their last working day is. Please send this to: timesheets@lifewise.org.nz

If your support worker is a permanent part-time employee, they may have accumulated annual leave hours or alternative days which they have not yet used. Any outstanding leave is paid out to them in their final pay (sick leave cannot be paid out in the same way).

Suggested steps to employ a support worker

1. Decide on the hours to be used each week, and days and times required
2. List all the tasks you will require your employee to carry out
3. List the skills and attributes your employee will require to do the job
4. Decide on a pay rate or possible range

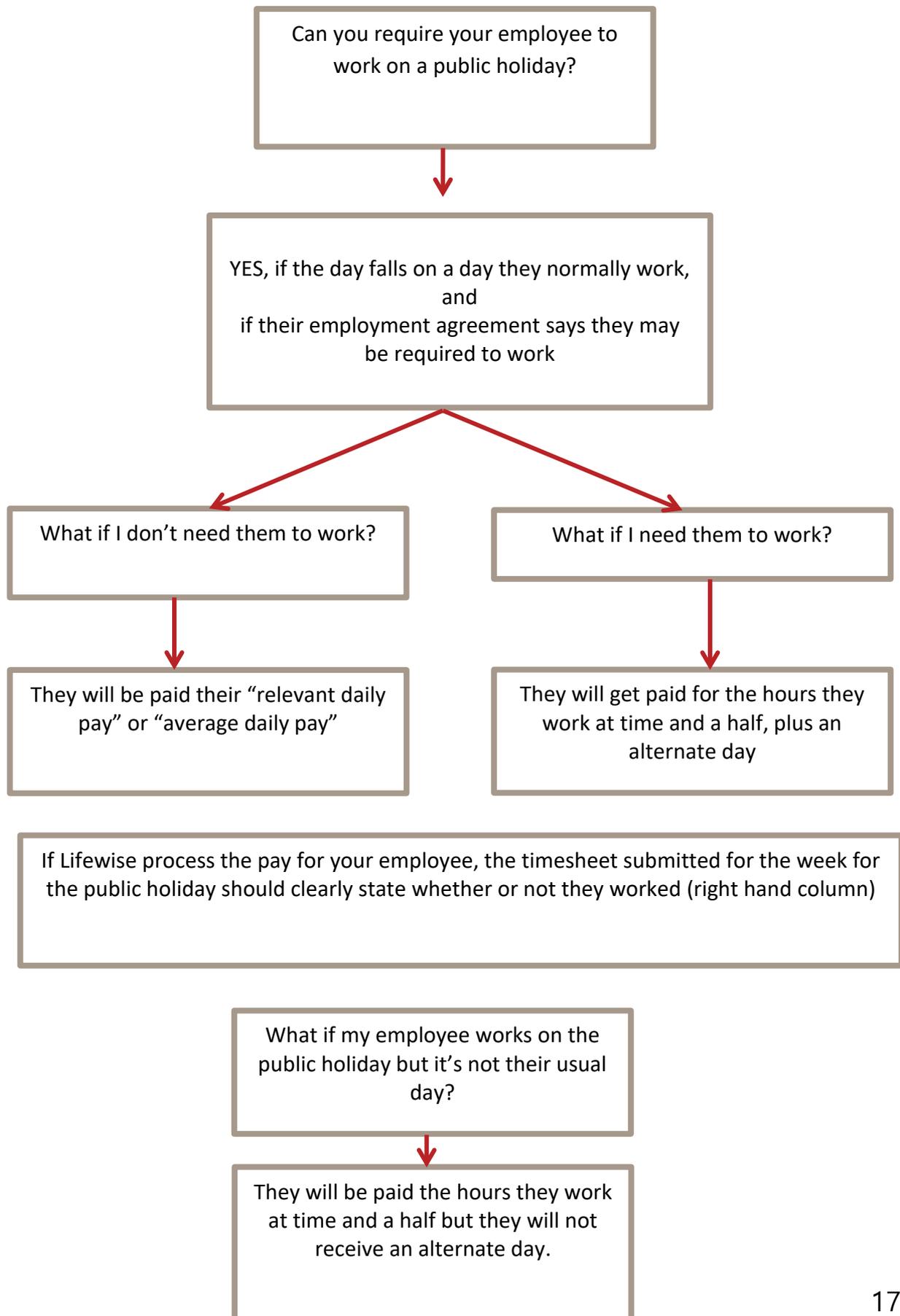
N.B. the current minimum adult wage in NZ is \$19.00 per hour (most people pay between \$19 - \$23.50 per hour depending on their qualifications, skills and experience)

 - Consider other expenses e.g. mileage, costs for outings, rubber gloves or other equipment you will supply etc.
 - Consider your obligations regarding paying annual leave, ACC etc. (approx. 12.75%)
 - Make sure these costs are affordable and can be managed within your Individualised Funding budget
5. Plan how you want to recruit your employee
 - From people known to you or word of mouth
 - Advertising
 - MyCare website (free for IF clients) www.mycare.co.nz
 - Seek website (various costs) www.seek.co.nz
 - TradeMe website (various costs) www.trademe.co.nz
 - Student Job Search (free)
 - Notice boards (free)
 - Local newspaper (various costs for classified ads)
 - Other agencies e.g. Lifewise, Panacea, LifePlus, Geneva Healthcare, Healthcare Vision, Medacs Healthcare
6. Write and place an ad - include:
 - The position
 - Hours required
 - Skills/experience needed
 - Start date
 - Contact details
 - Closing date for the ad
 - Any other relevant information e.g. *you will be caring for a young boy who is non-verbal and has some physical disabilities.*
7. If more than one person applies, choose the applicants you wish to interview. You probably want to select no more than four people to interview. Contact the others, thank them and tell them they have been unsuccessful.

8. Arrange to interview candidates
 - Prepare a list of questions you want to ask e.g.
 - a. What are their reasons for applying for the role?
 - b. Do they understand what the work entails?
 - c. Why did they leave their last job?
 - d. If there are any gaps in their employment history, what is the reason for this?
 - e. Do they have any experience of this kind of work?
 - f. Have they ever dealt with a difficult situation? How did they handle it?
 - g. Do they present themselves well?
 - h. Do they have any restrictions that would prevent them from fulfilling all requirements of the position description, i.e. health or other commitments?
 - Check that they meet any criteria that you require, e.g. having a driver's licence, or availability for particular hours/days
 - Ask for two recent referees
 - Check that they have the right to work in New Zealand
9. Phone their referees, and ask questions e.g.
 - a. What were their responsibilities in the role, and how was their performance?
 - b. Were they reliable and punctual?
 - c. How did they relate to their co-workers and customers/clients?
 - d. Did they have any conflicts in the workplace?
 - e. How well did they communicate?
 - f. Did they follow instructions?
 - g. Were there ever any issues that had to be addressed with them?
 - h. What was their reason for leaving the job?
 - i. Would they rehire them if they had the opportunity?
 - j. Do they think the applicant would suit the role they are applying for?
10. Complete a police check form, and send a copy in
11. Decide on your successful candidate, and offer them a job
 - Contact the unsuccessful candidate(s) and let them know they were unsuccessful
12. Arrange a time to complete:
 - Advice of employment
 - Individual Employment Agreement
 - Position Description

- IRD form
 - KiwiSaver forms
 - Bank account details
 - Schedule/roster
13. If Lifewise is doing your payroll, forward these forms to payroll at least four days before the end of the pay period. We must receive this information before we can pay your support worker.
 14. Plan an orientation for your new support worker i.e. go through the service delivery plan, teach them about any health and safety issues e.g. how to use the hoist.
 15. If you are unsure about any step in this process, please contact Lifewise.

Public holiday information



What do I need to think about when deciding if my support worker will work on public holidays?

- Do I really need support on the public holiday?
- That payment for my employee not working the public holiday will come out of my MOH allocation
- Payment for my employee working on the public holiday, plus time and a half and an alternate day, will come out of my MOH allocation. These costs are considered if Level 2 is chosen
- If my worker does not work and I get someone else to work, I will need to pay my usual worker plus the one that works on the day out of my MOH allocation
- Keeping records of when my employee works or does not work – if Lifewise is managing my payroll they will do this for me. Write on the worker’s timesheet if they worked or did not work (use the right hand column for this)

For more information, including definitions of “relevant daily pay” and “average daily pay”, go to <https://www.employment.govt.nz/leave-and-holidays/calculating-payments-for-leave-and-holidays/relevant-and-average-daily-pay/>

Payroll information

We process payroll fortnightly. **The deadline for submitting timesheets and invoices is 12.30pm on the Tuesday following the end of a fortnightly pay period (see calendar in your information pack).**

All invoices and timesheets are required to be fully completed and signed. Any timesheets received after the 12.30pm Tuesday deadline will be processed in the following pay period. In exceptional circumstances an additional pay run may be able to be negotiated on a case-by-case basis. An additional fee of \$25 would be charged in this situation. Any additional pay run must be approved by the Service Manager. Please give us a call if you want more information about this.

New employees for payroll: all employee documentation including Individual Employment Agreement, position description, tax forms, KiwiSaver and the advice of appointment form must be received **four** working days prior to the period end. Information received after this time will be processed in the next pay period.

When support workers resign: if your employee no longer works for you and we need to process a final pay for them, we need to receive their resignation form by the 12.30pm Tuesday deadline.

Submitting timesheets

Timesheets and invoices can be forwarded using the following methods:

| | |
|--|---|
| Post | In Person |
| Lifewise Homecare Services PO Box 10307 Dominion Rd Auckland 1446 | Gordon House 227 Mt Eden Road Mt Eden |
| By Fax | By Email |
| 09 630 8956 | timesheets@lifewise.org.nz |

If sending your forms in by email, please include them as attachments rather than in the body of the email. You can scan or take a photo of any forms that you wish to email to us, just please make sure the phot is clear and able to be read easily.

An example of a correctly filled in timesheet

Any timesheets that are submitted must be correctly filled in. This means that it must have the full name of the client and the employee as well as the agent's name if applicable. It must also have both the client and employee numbers. Dates must be correctly written and the hours should be clearly entered and totalled.

WEEKLY EMPLOYEE TIMESHEET

| | | | | | |
|-------------------|------------|-------------|------|----------------|---|
| Name of Consumer: | JADE SMITH | Consumer #: | 1234 | Name of Agent: | (if applicable the person managing funds on behalf of the Consumer) |
| Name of Employee: | JOHN BROWN | Employee #: | 9876 | Week Ending: | 03 JULY 2016 |

| | DATE | PERSONAL CARE HOURS | | | HOUSEWORK HOURS | | | SLEEPOVER/RESPITE (circle as applicable) | | | PUBLIC HOLIDAY WORKED YES OR NO |
|-----------|--------------|---------------------|--------|-------|-----------------|--------|-------|--|--------|-------|---------------------------------------|
| | | START | FINISH | HOURS | START | FINISH | HOURS | START | FINISH | HOURS | |
| MONDAY | 27/6/16 | 9 AM | 4 PM | 7 | 4 PM | 5 PM | 1 | | | | |
| TUESDAY | 28/6/16 | 9 AM | 4 PM | 7 | | | | | | | |
| WEDNESDAY | | | | | | | | | | | |
| THURSDAY | | | | | | | | | | | |
| FRIDAY | 01/07/16 | 9 AM | 3 PM | 6 | 3 PM | 5 PM | 2 | | | | |
| SATURDAY | | | | | | | | | | | |
| SUNDAY | | | | | | | | | | | |
| | TOTAL HOURS: | | | 20 | | | 3 | | | | |

Please note if your worker has taken any leave (annual, sick or statutory day), you must complete a leave form and send it in with this timesheet.

PLEASE ATTACH ALL RECEIPTS FOR EXPENSES/CLAIMS LISTED BELOW EXCEPT MILEAGE; RECORD NUMBER OF KM TRAVELLED EACH JOURNEY.

| DATE | PARTICULARS | AMOUNT |
|---|-------------|--------------------------------------|
| | | |
| | | |
| | | |
| Declaration by worker: I hereby verify that the hours on this timesheet were worked by me during the week shown above. | | Signed: JOHN BROWN Date: 01/07/16 |
| Declaration by consumer: I hereby verify that the hours on this timesheet are a true reflection of the hours worked by my worker. | | Signed: JADE SMITH Date: 01/07/16 |

Implemented 2011 Reviewed 06/16 Next review 06/17
Homecare Forms/Individualised Funding Weekly Timesheet

How to fill in a timesheet if it is a public holiday

Jade's employee John worked on the public holiday. He has clearly written that the hours were actually worked.

WEEKLY EMPLOYEE TIMESHEET

| | | | | | |
|-------------------|------------|-------------|------|---|--------------|
| Name of Consumer: | JADE SMITH | Consumer #: | 1234 | Name of Agent: (if applicable the person managing funds on behalf of the Consumer) | |
| Name of Employee: | JOHN BROWN | Employee #: | 9876 | Week Ending: | 12 JUNE 2016 |

| | DATE | PERSONAL CARE HOURS | | | HOUSEWORK HOURS | | | SLEEPOVER/RESPIRE (circle as applicable) | | | PUBLIC HOLIDAY WORKED YES OR NO |
|-----------|--------------|---------------------|--------|-------|-----------------|--------|-------|--|--------|-------|---------------------------------|
| | | START | FINISH | HOURS | START | FINISH | HOURS | START | FINISH | HOURS | |
| MONDAY | 6/6/16 | 9 AM | 4 PM | 7 | | | | | | | YES |
| TUESDAY | 7/6/16 | 9 AM | 4 PM | 7 | 4 PM | 5 PM | 1 | | | | |
| WEDNESDAY | | | | | | | | | | | |
| THURSDAY | | | | | | | | | | | |
| FRIDAY | 10/6/16 | 9 AM | 4 PM | 7 | 4 PM | 5 PM | 1 | | | | |
| SATURDAY | | | | | | | | | | | |
| SUNDAY | | | | | | | | | | | |
| | TOTAL HOURS: | | | 21 | | | 2 | | | | |

Please note if your worker has taken any leave (annual, sick or statutory day), you must complete a leave form and send it in with this timesheet.

PLEASE ATTACH ALL RECEIPTS FOR EXPENSES/CLAIMS LISTED BELOW EXCEPT MILEAGE; RECORD NUMBER OF KM TRAVELLED EACH JOURNEY.

| DATE | PARTICULARS | AMOUNT |
|---|-------------|---------------------------------------|
| | | |
| | | |
| | | |
| Declaration by worker: I hereby verify that the hours on this timesheet were worked by me during the week shown above. | | Signed: JOHN BROWN Date: 10/6/2016 |
| Declaration by consumer: I hereby verify that the hours on this timesheet are a true reflection of the hours worked by my worker. | | Signed: JADE SMITH Date: 10/6/2016 |

Implemented 2011 Reviewed 08/16 Next review 08/17
Homecare Forms/Individualised Funding Weekly Timesheet

Jade's other employee Elizabeth did not work on the public holiday, although she normally does work on a Monday. She is entitled to her normal pay and because of this has included her hours on the timesheet and clearly written that the time was not actually worked.

WEEKLY EMPLOYEE TIMESHEET

| | | | | | |
|-------------------|----------------|-------------|------|---|--------------|
| Name of Consumer: | JADE SMITH | Consumer #: | 1234 | Name of Agent: (if applicable the person managing funds on behalf of the Consumer) | |
| Name of Employee: | ELIZABETH GRAY | Employee #: | 9875 | Week Ending: | 12 JUNE 2016 |

| | DATE | PERSONAL CARE HOURS | | | HOUSEWORK HOURS | | | SLEEPOVER/RESPIRE (circle as applicable) | | | PUBLIC HOLIDAY WORKED YES OR NO |
|-----------|--------------|---------------------|--------|-------|-----------------|--------|-------|--|--------|-------|---------------------------------|
| | | START | FINISH | HOURS | START | FINISH | HOURS | START | FINISH | HOURS | |
| MONDAY | 6/6/16 | | | 2 | | | | | | | NO |
| TUESDAY | 7/6/16 | 5 PM | 7 PM | 2 | | | | | | | |
| WEDNESDAY | | | | | | | | | | | |
| THURSDAY | 9/6/16 | 5 PM | 7 PM | 2 | | | | | | | |
| FRIDAY | 10/6/16 | 5 PM | 7 PM | 2 | | | | | | | |
| SATURDAY | | | | | | | | | | | |
| SUNDAY | | | | | | | | | | | |
| | TOTAL HOURS: | | | 8 | | | | | | | |

Please note if your worker has taken any leave (annual, sick or statutory day), you must complete a leave form and send it in with this timesheet.

PLEASE ATTACH ALL RECEIPTS FOR EXPENSES/CLAIMS LISTED BELOW EXCEPT MILEAGE; RECORD NUMBER OF KM TRAVELLED EACH JOURNEY.

| DATE | PARTICULARS | AMOUNT |
|---|-------------|---|
| | | |
| | | |
| | | |
| Declaration by worker: I hereby verify that the hours on this timesheet were worked by me during the week shown above. | | Signed: ELIZABETH GRAY Date: 10/6/2016 |
| Declaration by consumer: I hereby verify that the hours on this timesheet are a true reflection of the hours worked by my worker. | | Signed: JADE SMITH Date: 10/6/2016 |

Implemented 2011 Reviewed 06/16 Next review 06/17
Homecare Forms/Individualised Funding Weekly Timesheet

Submitting invoices

You can submit invoices in the same way as timesheets, but please make sure you sign the invoice first to verify the hours worked.

Remember that we will also deduct the host fee from your budget when we reimburse you.

Here is an example of an invoice – we can email a template to you:

| | | |
|-------------------------|------------------------|-----------------------------------|
| INVOICE | | |
| Name of consumer: | Bob Jones | |
| Consumer number: | <u>7856</u> | LIFEWISE TRUST |
| Name of agent: | Annie Jones | LIFEWISE Homecare Services |
| | | PO |
| | | Box |
| | | 10307 |
| | | Dominion Road |
| | | Auckland 1446 |
| Week ending: | <u>1/01/2017</u> | |
| GST NO: | | |
| BANK ACCOUNT NO: | <u>0192-4899234-00</u> | |
| INVOICE NO: | <u>1034</u> | |
| *required | | |
| INVOICE DATE: | <u>1/01/2017</u> | |

| DATE | SERVICE (HM/PC/RC) | EMPLOYEE | HOURS | UNIT CHARGE | GST | TOTAL |
|----------------------------|--------------------|---------------|-------|-------------|--------|----------------|
| 27/12/2016 | PC | Matthew Brown | 2 | \$26.40 | \$3.96 | \$30.36 |
| 28/12/2016 | PC | Matthew Brown | 2 | \$26.40 | \$3.96 | \$30.36 |
| 30/12/2016 | PC | Matthew Brown | 2 | \$26.40 | \$3.96 | \$30.36 |
| | | | | \$0.00 | \$0.00 | \$0.00 |
| | | | | \$0.00 | \$0.00 | \$0.00 |
| | | | | \$0.00 | \$0.00 | \$0.00 |
| BALANCE TO BE PAID: | | | | | | \$91.08 |

Claim Form Declaration: Hosted Funding/Direct Fundholding

I accept that:

- I am fully responsible for the management of my Personal Budget.

I confirm, in relation to this claim for payment, that:

- the above information is a true and accurate record of the services/supports provided and or/expenses incurred
- I have complied with all of my Responsibilities in the Standard Agreement Declaration – Service Agreement
- all services/supports/expenses for which I have claimed payment have been incurred or accrued by me as at the date of this claim
- I have made, and will retain, full records supporting this claim. I will make these records available for audit on request.

| |
|---|
| Name of individual (or Nominated Agent): |
| Signature of individual (or Nominated Agent): |
| Date: |

This statement must be included and signed by you each time you submit an invoice.

Compliments & complaints

Lifewise Homecare Services welcomes suggestions for improvement from our clients, their family/whanau, and others. This may be in the form of a compliment or as a result of a complaint.

Compliments/Service Improvements: We welcome your feedback by email or phone. You can call your Case Manager or Team Leader – Disability Support and pass on your compliments or feedback about any part of the service that is working well for you.

Complaints/Concerns: Lifewise Homecare has a complaints policy. A copy is available on request. We encourage you to share any concerns or complaints that you may have. You can discuss these with your Case Manager, the Team Leader – Disability Support, or the Service Manager.

A copy of our complaints form is included in your info pack. You can complete this yourself or it can be completed by someone else on your behalf. We also encourage you to telephone us if you prefer.

The complaints process is sensitive to, and respects the values and beliefs of our clients.

All complaints are investigated fully and confidentially. You will be informed of the outcome of the investigation.

You may also access an independent advocate to assist you to make a complaint. The Health & Disability Advocacy service can assist you with this and can be contacted on 0800 555 050 or advocacy@hdc.org.nz They are able to provide advocacy for all cultures.

Where can I get more information or resources?

If you would like to find out more about how Lifewise can work with you, or have any questions about our Individualised Funding support, please contact:

Michelle Smith, Team Leader – Disability Support

09 623 6569 or email michelles@lifewise.org.nz

Michelle works 7.30am – 4.00pm Monday - Friday

You can visit the Ministry of Health's website for **Individualised**

Funding: <http://www.health.govt.nz/yourhealth-topics/disability-services/home-and-community-support-services/individualised-funding>

Throughout this booklet we have referred to several brochures available that may be useful for you. If you can't access the internet links, please ask us for a hard copy.

Thank you for choosing Lifewise as your host provider.

We look forward to working with you in the future.

Phone: 09 623 6569

Email: michelles@lifewise.org.nz

