

Wesley Home Care policy

Fees and Funds Management

1. Purpose

This policy outlines the principles and responsibilities guiding the effective and transparent management of fees, contributions, and funds related to the delivery of funded aged care services. It ensures that our organisation meets its regulatory obligations while supporting older people to understand, participate in, and make informed decisions about their individual budgets and financial arrangements. This includes services delivered under the Support at Home Program and the Commonwealth Home Support Program (CHSP).

2. Scope

This policy applies to all clients and staff members within Wesley Home Care.

3. Policy statement

Wesley Home Care is committed to maintaining strong financial governance and client-centred practices in the management of fees and funds for aged care services. We ensure that all pricing, claiming, invoicing, and budgeting activities are transparent, compliant with regulatory requirements, and responsive to the needs, preferences, and rights of clients. This includes entering into clear service agreements, supporting informed financial decisions, issuing timely and easy-to-understand statements, and maintaining accountable systems for managing unspent and contributed funds. We uphold the rights of clients to receive services without financial hardship and continuously review our practices to promote fairness, dignity, and respect.

4. Policy Commitment

Wesley Home Care upholds strong governance frameworks for the management of fees and funds and engages with clients to develop individual budgets that support delivery of both ongoing and short-term services.

Wesley Home Care commits to:

- Maintaining effective financial governance systems that align with legislative and regulatory requirements
- Entering into service agreements with clients (and/or their appointed decision-maker/s) which contain information related to fees, required contributions and pricing information (or where to find it)
- Ensuring that prices charged to our clients for funded aged care services comply with regulatory requirements
- Publishing prices on our website and the *My Aged Care Service and Support Portal*
- Ensuring that advertised prices represent the entire cost of delivering the service (e.g. inclusive of administration costs, travel fees etc)
- Supporting client (and/or their appointed decision maker/s) to understand, seek advice and take the time required to make informed decisions about their agreements, fees and invoices
- Collaborating with client (and/or their appointed decision maker/s) to create individualised budgets based on their approved classification category and level (i.e. quarterly budget for ongoing services and/or period specific budgets for short-term pathways)
- Ensuring claims are submitted accurately through the *Aged Care Provider Portal* and adhering to claiming requirements, including:



- Ensuring mandatory information is included when claiming for services (including required evidence as applicable)
- Only claiming for services on the *Support at Home Service List* that have been approved in the older person's Notice of Decision and that have been delivered
- Only claiming for services that have been agreed with the older person and using the agreed prices in the claim
- Keeping detailed and clear evidence of claiming and purchases to support claims that demonstrates:
 - the price for care and services was agreed
 - confirmation of delivery of care and services (including for Assistive Technology and Home Modifications)
- Providing an itemised invoice of services and supports (including care management and any short-term pathways) delivered for that period
- Complying with additional claiming requirements for care management activities and short-term pathways, including adherence to claiming timeframes and ensuring that care management activities for short-term pathways are claimed through the appropriate short-term process (refer to *Support at Home Program Claims and Payments*)
- Providing the older person (and/or their appointed decision maker/s) with information on the claiming process
- Completing the provider declaration confirming the accuracy of information submitted
- Maintaining records and evidence to support claimed amounts to demonstrate compliance with program guidelines
- Providing clients with monthly statements (no later than the last day of the following month) that are clear, simple and presented in a way they can understand and that details (as applicable):
 - Amount of funding available for the quarter or short-term pathway
 - Their contributions
 - Adjustments and refunds
 - Expiry dates of funding (e.g. short-term pathways)
 - Their subsidy received from Government
 - Itemised list of services or items delivered, including with details of date, provider and hours etc.
 - The funds balance including accumulated unspent or funds in arrears
- Issuing final statements to clients upon cessation of services (including short-term pathways)
- Ensuring services delivered are invoiced against the older person's allocated quarterly budget with each service itemised to ensure transparency and alignment with the approved budget allocation
- Implementing processes for reimbursement arrangements with clients (and/or their appointed decision-makers), ensuring that:
 - They are supported to make informed financial decisions by clearly explaining and providing information on reimbursement options (including reimbursement arrangements of their contributions)
 - They are informed of the claiming requirements, including their responsibility to provide evidence (e.g. receipts and invoices) to ensure compliance with claiming rules
 - Reimbursement relates to a service or item on the *Support at Home Service List*
 - The older person has been approved to receive the service or item as outlined in their Notice of Decision and Support Plan



- Discussions held and reimbursement arrangements are documented in the older person's file, individualised budget and care and services plan
- Conducting regular monitoring and reassessment to ensure the budget and/or contribution continue to enable individual client's needs, goals and preferences to be met
- Providing a timely and effective way for clients to seek explanation and clarification about financial matters relating to their services
- Responding quickly to invoicing errors and/or feedback from clients about incorrect payments and providing refunds if required
- Notifying Services Australia in a timely manner of any client starting, ceasing or transferring home care services
- Undertaking annual audits and other reviews to ensure financial practices and controls adequately protect and utilise client's funds
- Supporting clients to access financial hardship and/or advocacy supports if required
- Maintaining effective brokerage agreements with associated providers (i.e. contracted services) to ensure value for money and service quality is maintained
- Ensuring all applicable fees and charges (including co-contributions) are collected and payment acknowledged
- Maintaining clear and documented procedures for collecting client's contributions (where relevant) and specifying the expected contribution for each category of services prior to commencement of services
- Ensuring that annual indexation increases are outlined in the service agreement
- Reviewing pricing information at least annually and seeking each individual older person's consent before applying changes to pricing
- Keeping track of client's funds balance, including their unspent funds and any unspent funds held by the provider (in a separate account if required)
- Ensuring service planning is guided by the older person's individual quarterly budget, including any allowable carryover of unspent funds to be carried over from the previous quarter
- Ensuring workers who are supporting clients to understand their agreements, invoicing and payments have the appropriate skills and knowledge to do so
- Ensuring that clients are not required to pay their contributions in advance of services being delivered
- Implementing robust processes to mitigate risks related to mishandling of client's money when this is required for the provision of services
- Where Commonwealth Home Support Services (CHSP) are provided:
 - Making publicly available clear information about how clients' contributions are managed in a fair and consistent manner, including what supports may be available for client who are experiencing financial hardship
 - Implementing effective practices for managing CHSP payments including receipting, direct debiting or cash handling by care workers
 - Providing regular invoices and/or statements to clients containing information about their fees and charges for services
 - Providing a means by which clients experiencing financial hardship are able to receive care and services
- Seeking feedback from clients (and/or their appointed decision maker/s) their family, carers and others involved in their care on systems and process for managing funds, to support continuous improvement
- Partnering with clients and staff to regularly review and improve processes related to fees and funds management.



Roles and Responsibilities

Governing Body

The Governing Body is responsible for providing oversight of financial management and regulatory accountability through its risk and compliance management frameworks. They will identify appropriate systems and processes to manage risks associated with managing older people's funds and to monitor, review and continuously improve compliance with this policy.

Senior Management

Senior Management is responsible for ensuring this policy and associated processes are implemented and that all workers understand their duties and obligations. This includes providing sufficient resources, guidance and support to ensure older people's funds are managed in line with regulatory requirements. Senior Management will monitor implementation of this policy and related processes and provide reports to the Governing Body.

All Workers, including associated providers

All Workers, including associated providers (i.e. contractors and agency staff) are responsible for understanding and following this policy and related processes and completing all education and training as directed. They are responsible for reporting incidents, near misses, hazards, feedback and complaints as per organisational processes.

5. Responsibility and policy owner

The owner of this policy is the Executive Manager, Wesley Home Care.

The owner is responsible for implementing the policy and achieving the desired outcomes.

6. Consultation and approval

This policy has been developed in consultation with the Executive Manager, Wesley Home Care, the Senior Manager – Clinical Care, Wesley Home Care, Senior Manager – Direct Care, Wesley Home Care, Senior Manager – Consumer Experience, Wesley Home Care, the Quality Risk & Compliance Specialist, Team Leaders, and the Care Advisors, Wesley Home Care.

The policy has been approved by the Executive Manager, Wesley Home Care.