

## Expenditure approval process

### Considerations

This document is to be used when seeking approval for home care package expenditure that is not specified as an inclusion in the legislation.

Care managers and home care package recipients are required to consider the appropriateness of the expenditure, noting the cost of the care or service, and the expected benefits, that the bulk of the home care budget is funded by taxpayers.

Ongoing care and services must be prioritised to ensure continuing care needs and goals are met.

Care and services included in the care plan that will be purchased using the package budget should be drawn, for the most part, from the legislated inclusions, and must not include any legislated exclusions on Page 3 of this document.

### Process

The care planning and budgeting process will usually “pre-approve” well described items of expenditure not specified as a legislated inclusion.

1. Check if the item is on the Inclusions List, if so, this form is not required. Speak to your Care Manager about the availability of funds within your budget.
2. Check if the item is listed on the Exclusions List, if so, it is not allowable expenditure.
3. If the expenditure is not on either list, contact your Care Manager to discuss the appropriate next steps.
4. Work through questions (a) to (i) on page 1 of this document. The answer to all questions must be YES.
5. Depending on the type of equipment some additional documentation is required.
  - a. Simple off the shelf aids and equipment that assist performing daily living tasks (that do not present risks or require training) are generally allowable without an appropriate health professional report. They must be suitable, safe and directly related to aging.
  - b. Specialised and complex equipment that is generally adjusted to suit the care recipient's individual support needs requires a recommendation from an appropriate health professional (e.g., Occupational Therapist, Physio or Registered Nurse as in scope for their qualification), and to be linked to the care plan. It is important to make sure the equipment is supplied and setup correctly to avoid any risk of injury.
6. All expenditure must be recorded in the care plan and budget, approved prior to purchase and cannot be supported at the expense of service delivery.
7. If the expenditure is declined, you will be notified in writing (via email), explaining the reason why.

# ALLOWABLE HOME CARE PACKAGED EXPENDITURES

Key responsibilities of care management, and keeping home care packages compliant



<i>Name:</i>	<i>Date:</i>
<i>Notes:</i>	
<i>Completed by:</i>	

If the expenditure is not specifically listed as allowable (see page 2), complete this check list and email to your care manager. The invoice description must link the expenditure to care goals and must be included in the care plan and budget. This may need to be updated.

The check list below is documented and filed. You must answer YES for all (a) to (i). Where a NO exists, there might be opportunities to discuss what is possible with Local Guardians and the Aged Care Quality Commission.

Expenditure must be within the package budget and:

- |   |        |  |        |
|---|--------|--|--------|
| a) Be directly linked to the identified care needs and goals to optimise health and wellbeing?              | Yes No | e) Is not an exclusion as listed on page 3?  | Yes No |
| b) Is necessary to remain living safely and independently at home?  | Yes No | f) Only directly benefits the care recipient (has no significant benefits to others)                         | Yes No |
| c) Represents value for money and considered an acceptable use of Government funds?                         | Yes No | g) Is not available informally through the community   | Yes No |
| d) Is evidence based to address the assessed care need in the ACAT or a healthcare professional assessment? | Yes No | h) Does not exclude more important care / support services identified in the care plan and can be delivered? | Yes No |
|   |        | i) It does not pose a risk to the health and safety of the care recipient or community.                      | Yes No |

## Specified Home Care Package **Inclusions**. Sec 3, Quality of Care Principles 2014

### **Personal services & activities of daily living & lifestyle**

Personal assistance, including individual attention, individual supervision and physical assistance, with:

- + Bathing, showering, personal hygiene and grooming, dressing and undressing, and using dressing aids
- + Toileting
- + Mobility, transfer (including in and out of bed)
- + Communication including assistance to address difficulties arising from impaired hearing, sight or speech, or lack of common language, assistance with the fitting of sensory communication aids, checking hearing aid batteries, cleaning spectacles and assistance in using the telephone
- + Assistance with preparing meals including assistance with special diet for health, religious, cultural or other reasons
- + Assistance with using eating utensils and eating aids and assistance with actual feeding
- + Providing enteral feeding formula and equipment
- + Encouragement to take part in social and community activities that promote and protect the care recipient's lifestyle, interests and wellbeing

### **Continence management**

- + Assessment for and, if required, providing disposable pads and absorbent aids, commode chairs, bedpans and urinals, catheter and urinary drainage appliances and enemas
- + Assistance in using continence aids and appliances and managing continence

### **Mobility and dexterity**

- + Providing crutches, quadruped walkers, walking frames, walking sticks and wheelchairs ( items must be suitable, safe and a recommended item)
- + Providing mechanical devices for lifting, slide sheets, sheepskins, tri-pillows, and pressure relieving mattresses
- + Assistance in using the above aids

### **Support Services**

- + Cleaning, making beds, ironing, dusting, vacuuming and mopping
- + Personal laundry services, including laundering of care recipient's clothing and bedding that can be machine-washed, ironing or arranging for dry-cleaning of care recipient's clothing and bedding that cannot be machine washed
- + Gardening; weeding, light pruning and lawn mowing
- + Medication management
- + Rehabilitative support, access help; to meet a professionally determined therapeutic need
- + Emotional support including ongoing support in adjusting to a lifestyle involving increased dependency and assistance for the care recipient and carer, if appropriate
- + Support for care recipients with cognitive impairment, including individual therapy, activities and access to specific programs designed to prevent or manage a particular condition or behavior, enhance quality of life and provide ongoing support
- + Providing 24-hour on-call access to emergency assistance including access to an emergency call system if the care recipient is assessed as requiring it
- + Transport and personal assistance with shopping, visit health practitioners, emotional support, social support and attending social activities
- + Respite care delivered in the home
- + Home maintenance, such as cleaning gutters, changing light globes and minor repairs
- + Modifications to the home, such as easy access taps, shower hose or bath rails. Major modifications or structural changes are not funded through the Package
- + Assisting the care recipient, and the homeowner if the homeowner is not the care recipient, to access technical advice on major home modifications
- + Advising the care recipient on areas of concern in their home that pose safety risks and ways to mitigate the risks
- + Assistance to access support services to maintain personal affairs

### **Clinical care**

- + Nursing: wound care management, medication administration, general health and other assessments
- + Allied health and therapy services such as speech therapy, podiatry, occupational or physiotherapy services
- + Other clinical services such as hearing and vision services.
- + Access, referral to other health and related services, or health practitioners
- + Providing bandages, dressings, and skin emollients

## Specified Home Care Package Exclusions

- A. Use of package funds as a source of general income for expenses not directly related to aging, (household bills, public transport, petrol, car servicing/ registration, toiletries, cleaning products, clothing, shoes, insurance or funeral cover, pest control, gutter replacement, whitegoods, smartphones & phone plans, computers, internet, television, Foxtel, Netflix etc.)
- B. Installation/ replacement/ repair/ maintenance/ servicing/ cleaning of water tanks, fencing, roofs, heating, cooling or hot water systems, swimming pools.
- C. Home renovations, modifications or capital items that are not related to the care recipient's care needs such as purchasing or replacement of fixtures, equipment or fittings that are considered basic accommodation responsibilities of the homeowner, tenant or landlord
- D. Purchase of food or drinks (including products like Sustagen), except as part of enteral feeding requirements
- E. Services that can be covered under the public health system, including medical benefits schedule (MBS), pharmaceutical benefits scheme (PBS), Medical Specialists, Dentistry, Hear Aids, Diagnostic imaging, eye tests and out of pocket contributions
- F. Payment for permanent accommodation, including assistance with home purchase, mortgage payments or rent, residential care (govt funded or privately funded), rates, home and contents insurance
- G. Basic daily fee, income-tested care fee and additional fees
- H. Travel and accommodation
- I. Cost of entertainment activities, such as gym and pool membership or access, if not monitored by an appropriately trained professional, tickets to sporting events or hobbies.
- J. Gambling activities

## Legislative intent

The Home Care Package Program provides coordinated care and services that help senior Australians meet their assessed care needs to continue to live independently in their home for as long as it is safe.

Expenditure must within the limits of both the budget and the scope of the Program. It must relate to aging and not be an expense that all Australian's have.

Home Care Package funding must be considered as an acceptable use of government funds:

- is not extra income that can be used for everyday items and costs or at your discretion.
- cannot be used to pay for usual cost of living expenses or for the purchase or replacement of household items or home renovations
- can only benefit the care recipient, funds cannot be spent on or seen to be benefiting the carers or family members (shared living arrangement, any services such as cleaning are payable from the fund on a pro-rata basis).

# Frequently asked questions

## Allowable

- + Meals - only meal preparation and delivery are allowed (the ingredients are not allowable) at a rate of 70% of the full cost. Must be a ready-made meal ordered through a meal delivery company, not purchased from a Supermarket, take away, restaurant or food delivery services e.g., UberEATS. Limited to 7 of breakfast /lunch / dinners per week.
- + Specialised and complex equipment requires a recommendation from an Occupational Therapist or Physio and to be linked to the care plan and budget. It is important to make sure the equipment is supplied and setup correctly to avoid any risk of injury.
- + Allied health services such as Physio, Podiatry, Osteo. Gap payments on private health insurance are NOT claimable through the package. Massage must be delivered by a suitably qualified professional, e.g., physio, remedial massage, osteo or massage therapist.
- + Psychology visits are payable AFTER Medicare funded visits through a Mental Health Care Plan have been exhausted. Any GP can refer you to the Mental Health Care Plan program.
- + Falls detection watch is allowable (premium product at owners' expense).
- + Community access and group activities - must be linked to aging i.e., attending Men's Shed, Senior Citizen membership, day programs, supplies to participate in the group activities are not allowable.

## Excluded

- + Hobbies: any item that is essentially a personal hobby such as cameras, gaming device/ chairs, internet, club subscription, consumables etc.
- + Beauty therapy such as hairdressing or manicures
- + Vitamins, supplements and all medications (PBS or Non-PBS medications are not allowable. Meal replacements e.g., Sustagen
- + Dentistry, dentures, prostheses, diagnostic imaging, specialist consultation, natural therapies.
- + Prescription glasses, spectacles, lenses and frames. Exception for specialised visual aids with an assessed care need regarding impaired sight.
- + Building improvements and building structures (capital), including security doors, flooring, painting, inside and outside cameras, driveways etc. or relocation expenses. Any structural changes, e.g., moving walls or moving plumbing
- + Any pet related expenses, including dog walking and grooming
- + Gardening: e.g., garden related purchases, planting, garden beds, watering systems, landscaping, removal of trees, garden beds or shrubbery. Excess allocation of funds to gardening
- + Whitegoods/ furniture - including but not limited to air-conditioning, heating, fridges, microwaves, televisions, food blenders, vacuums, off the shelf beds and mattresses, these are a general expenditure item of personal nature within all accommodations is not allowable.