

# Getting started with Manawanui



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It's your life, **YOU** choose

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# Welcome to Manawanui

Now that you've made the decision to use your funding in an individualised way and have chosen us to support you, there are a few forms to fill in and some responsibilities you need to be aware of.

This guide contains the information and forms you will need to get started. Your Coach will help you through the process.

## So what is Individualised Funding (IF)?

IF is a way of paying for government funded disability supports. How you can use your funding depends on who your funder is (e.g. Ministries of Health, Education, Social Development, or a District Health Board), and what programme you are on (traditional IF, Enhanced IF or EGL). Your needs are assessed and supports allocated. This is translated into an annual budget and is what you have to spend over the next year on your support needs.

### Service criteria:

1. Must be a disability support
2. Must help you reach your goals
3. Must be within the scope of relevant MoH policies and responsibilities (see what's out).

### What's in?

Any goods, services and facilities (or related and incidental costs, such as recruitment and training) that promote the person's independence and their inclusion and participation in education, paid and unpaid work, home and civic life, and the community but which result in them facing additional costs that they would not face if they did not have a disability.

### What's out?

- Disability supports that are fully or partly funded by other government agencies or public organisations, such as ACC, DHBs, therapies, housing modifications or other Ministry of Health funded services.
- Costs related to medical supplies, equipment, home renovations, leisure, recreation and personal or family costs.
- Payment of rent, personal travel expenses, purchase of alcohol, gambling, donations or illegal activities.
- Supports that could normally be obtained through informal supports, community services and government services (such as health, education, welfare benefits, employment support, and child, youth and family services).
- IF can't be used to increase the personal income of an individual or family.





## How does it work?

You work with us to develop an Individual Service Plan. Your plan will describe how you are going to use your budget to contribute to your goals and needs as they relate to your disability support services.

You are then responsible for purchasing the support you need, employing staff, and all the responsibilities that go along with being an employer. Manawanui will support you along this journey.

## What does Manawanui do?

Manawanui is a contracted Host Provider. This means we can support you:

- To design your Individual Service Plan
- To manage payments
- With recruitment processes
- To manage the requirements and responsibilities of being an employer.

Your funder pays Manawanui a set-up and ongoing management fee. This fee covers:

- Set-up on IF
- Ongoing basic Coaching support and advice
- Reimbursement of expenses (you/your contractor are responsible for all IRD, ACC & associated payroll functions & requirements)
- Monthly email statement with free newsletter (there is a \$5/month fee for posted hard copies of statements)
- Freephone Customer Experience Centre
- Access to Manawanui's Client Web Portal where you can set your budget, manage expenditure, submit expense claims and timesheets, and manage your staff
- Network meetings in your area.

## Payroll Service

Manawanui can manage your payroll for you by:

- Paying your staff
- Completing all tax requirements including PAYE, ACC and KiwiSaver
- Providing Payroll reports and payslips to you.

You simply send in a Timesheet to us fortnightly for each of your employees and we do the rest.

The cost for this service is **\$15/fortnight**, regardless of how many employees you have or your funding allocation. This is a set fee that is charged whether you submit a timesheet or not.

## Getting started

When we receive your referral we will talk to you about whether you want to manage the payroll yourself or get us to manage it for you. We will set you up in the Client Web Portal so you can manage everything online. If you don't have access to a smart phone, tablet or computer, we will talk to you about other options to get you set up. There are a couple of documents you will need to fill out and these are all available online and in the back of this book.

## Service Agreements

One of the key documents you will need to sign is the Service Agreement. This outlines our responsibilities, your responsibilities and, if you are Ministry of Health funded, their seven client responsibilities. You will need to sign this document and return it to us before your service can start.

# Set-up Process

 manawanui

1



Referral  
from NASC

2

Manawanui contacts  
you to talk about  
set-up option



4

Start date  
request and  
ISP sent to  
NASC



3



Client Web Portal  
profile set up;  
Forms completed;  
Individual Service  
Plan (ISP) created

5



Start date  
confirmed by  
NASC

6

Manawanui confirms  
your start date with  
you and confirms all  
forms are completed



7

**Start using your IF**  
(Coaching & CEC  
support as needed)



## Privacy Notice

### (Ministry of Health funded clients only)

Another crucial document is the Privacy Notice, that the Ministry of Health requires you to sign with each of your employees and contractors when they start work. You do not need to give this to us, you keep it with your records, although we may ask to see it during a review.

## Budgeting, Finance & Payroll

As you are in control of your government funding, there is a requirement to manage and account for those funds.

It is important that you maintain your own budget throughout the year to track expenses against your available funds.

You can do this easily on the Client Web Portal and Manawanui has budgeting tools to help you work out how much money you have each week.

Please note: IF cannot be used to employ or contract support workers who are:

- The spouse/partner or parent (including, step, adopted, de facto and foster parent) of the disabled person, or
- Family members who live in the same house as the disabled person (a family member is defined as a grandparent, grandchild, daughter, son, sister, brother, aunt or uncle).

All expenses claimed, including support services purchased from third party providers, that are over \$500 must have an invoice or receipt attached to your Timesheet/Expense Claim Form for these to be processed.

Expenses over **\$500** (excluding support) and all IT related items need to be approved by Manawanui **prior** to purchase.

## Bank Accounts

We will ask you to open a bank account that is to be used specifically for the management of your IF funds. This will make it easier for you to track your spending and for an appropriate agency to audit you without the need to look into your personal accounts.

Manawanui will make payment of any relevant expense claims into this account or, in the case of wages, directly into the accounts of your support staff.

## Minimum hourly pay rates

Support workers employed under Individualised Funding have minimum pay rates that apply. These pay rates are determined by what qualifications they have. It is a legal requirement that you pay these rates as a minimum, although you can pay higher if you would like to. The pay bands and minimum pay rates are below:

**Wage rates table**

Qualifications*	Pay Band	Minimum hourly rate 1 July 2019	Minimum hourly rate 1 July 2021
None or less than 3 years' of service	L0	\$20.50	\$21.50
Level 2 or 3+ years' of service	L2	\$21.50	\$23.00
Level 3 or 8+ years' of service	L3	\$23.00	\$25.00
Level 4 Or 12+ years' of service	L4	\$25.50	\$27.00

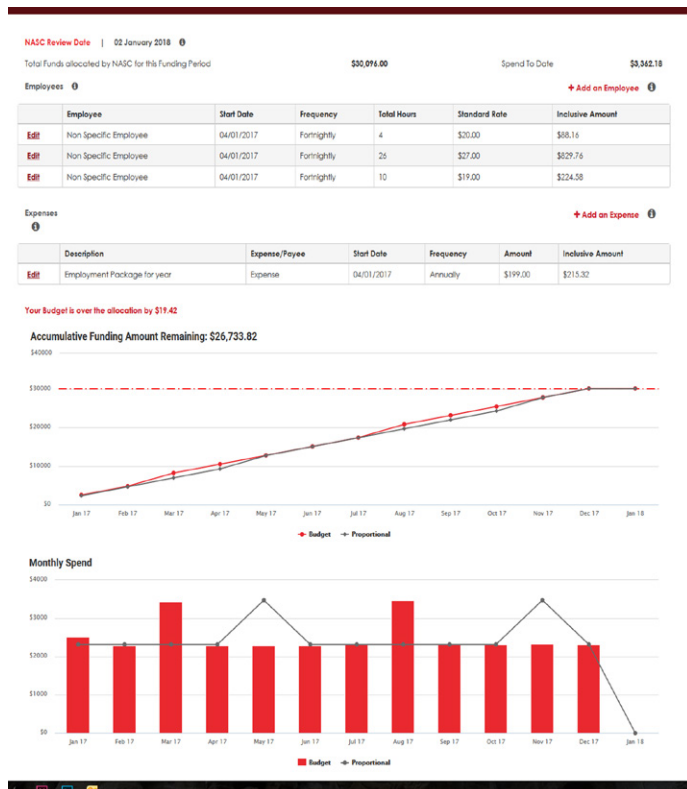
\* Qualifications must be a NZ Certificate in Health & Wellbeing from an NZQA accredited provider, or equivalent (a list of qualifications is available from Careerforce at [www.careerforce.org.nz/pay-equity/equivalencies/](http://www.careerforce.org.nz/pay-equity/equivalencies/)).

## Payment Authorisation

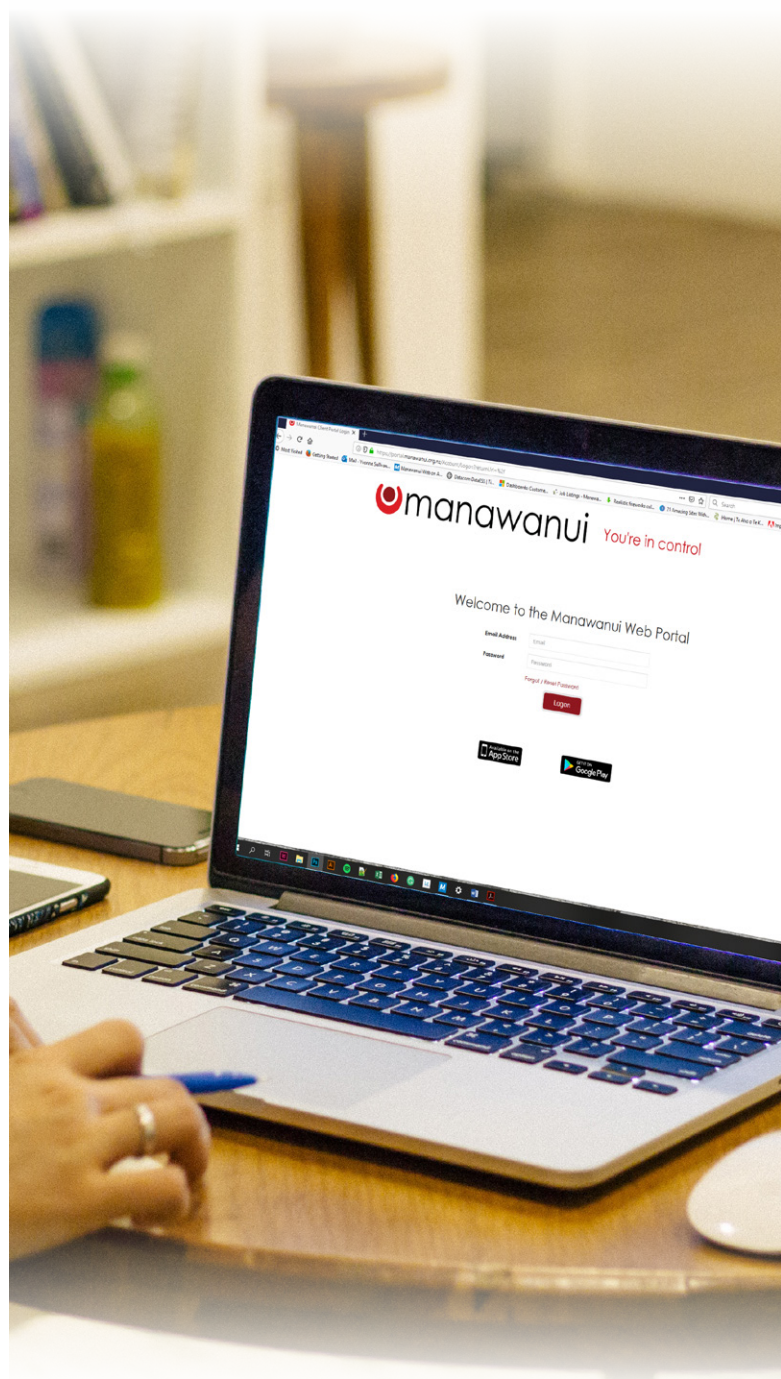
You will need to complete a Payment Authorisation Form so that we can act as your agent with respect to the performance of payroll functions. This form needs to be filled in by the person who will be registered as the employer (either the disabled person or their agent). IRD numbers are needed as you will be set up as an employer with IRD.

## Client Web Portal

Our Client Web Portal is a no fuss way to manage your funding. You can submit expense claims and timesheets, manage your support staff and payees and check where your funding balance is at. You can also monitor and adjust your budget, access the forms and documents you need and contact your Coach or the finance team directly.



# Register for the Manawanui Client Web Portal



<https://portal.manawanui.org.nz/apply>



# Using Manawanui's Payroll Service

## Setting up your employee

Any support person working for you on a regular basis will, in most cases, be considered an employee.

Manawanui runs a payroll each fortnight (you will get a calendar of dates). Pay periods run from a Monday of the first week to the Sunday at the end of the second week.

If you do not use the Client Web Portal, you will need to complete the forms below which can be found on our website or included with this booklet:

- Employee Information Form for each employee. It is important that you complete all fields marked with an asterix. Pay rates must be at least minimum wage.
- IR 330 or IR330C (Tax code) form for each employee.
- KiwiSaver **Deduction Form** (KS 2) for each employee.

New employees can opt out of KiwiSaver between the 2nd and 8th week of starting their employment with you.

If they don't opt out in this time-frame, deductions will continue to be made from their pay. To opt out your employee must complete the New Employee Opt-Out Request (KS 10).

Copies of all employee documents need to be sent to Manawanui to action. Make sure you keep a copy of all documentation for your own records.

## Please note:

It takes 14 days to set you up as an employer and three days to set up your employees. **This must be completed before timesheets are sent.**

## Important dates:

- A Payslip Summary Report is sent to the employer when the Timesheet and Expense Form is processed by us (usually a Monday or Tuesday), employers receive a final report when the bank authorises the payment (usually a Wednesday).
- Payslips are sent to the employer when the pay goes into the employee's account which can then be forwarded to the employee (usually a Thursday).
- Timesheets must be submitted no later than **close-of-business of the Monday** immediately following the end of each fortnight period.

Timesheets can be submitted through the Client Web Portal or sent by email.

## Please note:

Payment can only be made on the receipt of a Timesheet on which you will have recorded details of the employees that worked for you during that period and the hours they worked, including any leave taken. If a Timesheet is not received we cannot make payment to your employees.



# e-Mploy is now live

We know that finding the right person to support you can sometimes be difficult. e-Mploy may have the solution.

Advertise jobs and search from a pool of potential employees. Find the support you want, when you want it.

e-mploy  
Love what you do

Manawanui's **free** online recruitment website

[www.e-mploy.org.nz](http://www.e-mploy.org.nz) | 0508 462 427 | [info@e-mploy.org.nz](mailto:info@e-mploy.org.nz)

## Self-Managing

Manawanui will make payment into your bank account on the receipt of an expense claim in the Portal or the appropriate Expense Claim Form. You are responsible for managing all aspects of the funds and providing adequate accountability for their use. Expenses over **\$500** need to be approved **prior** to purchase. You can attach the receipt to your claim in the Portal or you will need to provide a copy of it with your Expense Claim Form.

The following steps/documents are required to set you up:

- Payment Authorisation Form to ensure any payments we make go into the right account. This form needs to be filled in by the person who will be managing the funding (either the disabled person or their agent).

### Important dates:

- Expense Claim Forms must be submitted no later than **12 midday of the Monday** immediately following the end of each fortnight period.

Expense Claim Forms can be sent via email, or submitted through the Client Web Portal.

## Employer Responsibilities

In most cases, the people providing your support will be your employees. As such you have some responsibilities as an employer.

It is important that you keep accurate and complete records of spending and personnel.

## Person receiving funding or their agent's responsibilities

- Completing the required paperwork needed each fortnight to claim for the hours of support that have been provided
- Keeping all relevant records related to your supports
- Recruiting or contracting your own staff to provide the support you want
- Keeping track of your support hours used
- Negotiating Employment Agreements or Contracts for Service with the people you want to provide your support.

### Please note:

Ensure Employment Agreements are completed and signed **before** the person starts working.

## Record keeping

### Employee records

Wage, time and leave records must be kept for each employee.

If you use Payroll, Manawanui maintains these records for you. If you are Self-Managing, you should obtain advice from the Ministry of Business, Innovation & Employment, or a qualified agency, as to the specific requirements.

The Employment Relations Act 2000 does not require employers to keep personnel files, however the Act has two time-frames that are important to remember. An employee may raise a personal grievance up to 90 days after an employment relationship has ended and once raised it can remain alive for a further three years.

Under the Privacy Act, personal information must be stored securely to protect it from loss, modification, disclosure and misuse.

## Wage and payment records

The employer is required to keep the following records for six years which Manawanui or the Funder may ask to view for audit purposes:

- Employee's Timesheets
- Receipts for any claims made for support-related expenses
- Invoices received from contractors you have received support services from
- A copy of the fortnightly Expense Claim Form (for those not managing their payroll via Manawanui).

## ACC employer contribution

ACC requires all employees and employers to pay a levy. The employee portion is part of the PAYE deduction from their salary. The employer portion is the amount the employer pays for each employee and is invoiced annually by ACC.

## Payroll Service

Manawanui takes care of the Employee Contribution as part of our payroll services. We also pay the Employer Contribution on your behalf. If you receive an invoice from ACC, you just need to forward it to the payroll team and we will take care of it.

## Self-managing

You are responsible for ensuring that the Employee Contribution is included in your employee's PAYE. You are also responsible for paying the Employer Contribution, which ACC will invoice you directly for annually.

For more information visit

[www.manawanui.org.nz/form-documents](http://www.manawanui.org.nz/form-documents).

## Other Services

Manawanui has a range of additional services you can purchase using your IF. For more information or to purchase these services visit [www.manawanui.org.nz/our-services](http://www.manawanui.org.nz/our-services), contact your Coach or our Customer Experience Centre on 0508 462 427.

## Employer Protection & Support Package - \$199 per year

Getting your recruitment right and being a good employer are critical to having a successful working relationship with your support person. Getting the job description right, knowing what to ask and having employment agreements in place are all part of being an employer. You may want employment relations advice from time to time and in any employment relationship there is a risk that disagreements will turn into formal legal disputes. Our Employer Protection & Support Package will help you get it right the first time and protect you if the worst happens.

It includes:

- Employment Disputes and Employer Liability insurance
- Membership to the Employers and Manufacturers Association (EMA) with access to their employment relations advice service, seminars and online sources
- Recruitment and employment templates and resources.



## Schedular Payments

If you use the Manawanui Client Web Portal you can have Schedular Payments deducted directly from the amount you pay your contractors giving you, and them, piece of mind that they are meeting their tax obligations.

If you do not use Manawanui's payroll service there is a \$15/fortnight fee to use Schedular Payments.

## Computing Solutions

Our partnership with the NZ Technology Group and Need a Nerd enables you to purchase a range of technology and have it delivered to your door. Need a Nerd can help you set everything up in your own home and provide ongoing support if required.

## Training Package - \$1000-2000 (depending on qualification undertaken)

You can use your IF to pay for training for your staff. From July 1, 2017 as part of the new Pay Equity Legislation, employers must take all reasonable steps to enable their support staff to undertake formal NZ qualifications. Manawanui is an Accredited Assessor under the NZQA framework and can support you and your staff with:

- Access to NZ Certificate in Health and Wellbeing Level 2, 3 and 4
- Development of training plans
- Assessment of unit standards
- Registration of qualification with NZQA
- Support as needed.

## Health and Safety

Manawanui has developed a Health & Safety Manual for people using IF. This manual is tailored for people whose home is also a work place.

You can purchase the Health & Safety Manual, Health & Safety Starter Kit or the Health & Safety Full Kit. The Starter Kit includes the Manual plus a specially designed folder with all the forms and resources you will need. The Full Kit includes the Starter Kit plus two smoke alarms and a basic first aid kit.

**Health & Safety Manual** **\$15**

**First Aid Kit** **\$20**

**Health & Safety Starter Kit** **\$25**

(Includes the Health & Safety Manual, copies of important forms, handy Health and Safety checklists and a folder to keep everything in)

**Health & Safety Full Kit** **\$60**

(Includes the Health and Safety Manual, copies of important forms, handy Health and Safety checklists, a folder, a basic first aid kit and 2 smoke alarms)



*All forms and resources can be found on our website [www.manawanui.org.nz](http://www.manawanui.org.nz), or you can call our Customer Experience Centre on **0508 462 427**.*



FOR COMPLAINTS AND MORE ABOUT YOUR RIGHTS:	FOR COMPLIMENTS AND COMPLAINTS:
<p>HEALTH AND DISABILITY COMMISSIONER</p> <p>National Freephone: 0800 11 22 33</p> <p>Email: <a href="mailto:hdc@hdc.org.nz">hdc@hdc.org.nz</a></p> <p>Website: <a href="http://www.hdc.org.nz">www.hdc.org.nz</a></p> <p>YOUR LOCAL ADVOCATE</p> <p>Freephone: 0800 55 50 50</p> <p>Free Fax: 0800 2 SUPPORT/0800 2787 7678</p> <p>Email: <a href="mailto:advocacy@hdc.org.nz">advocacy@hdc.org.nz</a></p> <p>Website: <a href="http://www.hdc.org.nz/advocacy">www.hdc.org.nz/advocacy</a></p>	<p>MANAWANUI</p> <p>Phone: 09 444 8440, 0508 462 427</p> <p>Email: <a href="mailto:info@manawanui.org.nz">info@manawanui.org.nz</a></p> <p>Website: <a href="http://www.manawanui.org.nz">www.manawanui.org.nz</a></p>

# Payment Authorisation

## For Individualised Funding Managers or Agents

### Personal Details

Person Receiving Funding\*

NHI Number

Agent's Name

IRD Number

Address

Client Code\*

Town

(You will find your client code on the top of your statement. If you do not have a statement please contact our Helpdesk on 0508 462 427)

Post code

City

E-mail

### Bank Account\*

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Bank

Branch

Account

Suffix

Name of Account

### Sign

Please sign here to confirm this is the bank account for payment of funds/claimed expenses

Signature \_\_\_\_\_

Date

### IF YOU ARE USING MANAWANUI PAYROLL SERVICES PLEASE SIGN BELOW

AUTHORISATION BY IF MANAGER/AGENT:

I authorise Manawanui Support Ltd. to act as my agent for Datapay. Accordingly, I understand that Manawanui Support Ltd. may need from time to time, provide Inland Revenue information about me, in relation to my tax obligations as an Individualised Funding \_\_\_\_\_ in order to fully comply on my behalf with any statutory payroll related requirements, as an employer.

Signature \_\_\_\_\_

Date





# Employee Information Form

Please complete this form for each employee. To return to Manawanui please press the submit button at the bottom of the form or save and e-mail as an attachment to [info@manawanui.org.nz](mailto:info@manawanui.org.nz). Please remember to save a copy for your records. Please ensure all information areas marked with an asterisk \* are completed.

Person Receiving Funding\*  NHI Number   
Agent's Name  Client Code\*

(You will find your client code on the top of your statement. If you do not have a statement please contact our Helpdesk on 0508 462 427)

## Employee Information

### Personal Details

Surname\*  Date of Birth\*   
First Name\*  Phone   
Address\*  Gender ☐ Male  
Town  ☐ Female  
Post Code  ☐ Other  
City\*   
E-mail  Start Date with Employer\*

### Bank Account\*

Bank			Branch			Account						Suffix		

### Tax Information

IRD Number\*  Tax Code\*   
Child Support (through IRD, not private arrangement) ☐ Yes ☐ No  
Amount   
Employment Agreement Completed and Signed\* ☐ Yes ☐ No

## Appointment Information

Position

Tenure\*

☐

Permanent

☐

Casual

## Wage Details

Hourly Rate\*

Hourly rate excludes the 8% holiday component. If your employee has multiple wage rates, please state accordingly.

Days worked per week

Hours worked per day

Non standard hours

☐

## Allowances and Deductions

Does your employee contribute to KiwiSaver?\*

☐ Yes

☐ No

If yes, what percentage

Is your employee exempt?

☐ Yes

☐ No

**Please note:** All new employees (based on start date above) will automatically be opted in to KiwiSaver for 2 weeks, unless they are exempt - refer to [KiwiSaver website](#) for [list of exemptions](#). From 1 April 2013, Employers are required to contribute the equivalent of 3% of their employee's gross salary or wages.

List any additional allowances for this employee (e.g. travel)

## Leave Entitlement

tick option based on your agreement with your employee\*

☐

20 Days

☐

Average  
hours  
Accrued

☐

8%  
included  
with pay  
(applies to  
casual  
employees  
only)

## Sign

\_\_\_\_\_  
Employee Signature

Date

\_\_\_\_\_  
Employer Signature

Date

# Fortnightly Expense Claim

## For Verified Support Delivered

### Personal Details

Person Receiving Funding*	<input type="text"/>	Client Code*	<input type="text"/>
Agent's Name	<input type="text"/>	(Your code is on the top of your statement.)	
Fortnight Ending*	<input type="text"/>	Today's Date	<input type="text"/>

### Declaration

I accept that:

- I am fully responsible for the management of my Individualised Funding

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

- The below information is a true and accurate record of the services/supports/expenses provided
- I have complied with all my responsibilities in the Manawanui Service Agreement and the Ministry of Health's Standard Agreement Declaration - Service Agreement
- All services/supports/expenses for which I have claimed payment have been incurred 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.

### Expenditure Claimed for the Fortnight

(you must identify each person providing support every time)

Date	Name of Person or Organisation (check if respite)	Address	Phone	DOB	Total Hours	Amount
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
Date	Other expenses - description of expense (you must keep a receipt for these)					Amount
Signature					Total	

**Important:** Please remember to keep a copy of this form and any receipts for auditing purposes.

**You must complete the form fully for your claim to be processed**

## Instructions for Completing your Expense Claim

- Please specify if expense is to come out of your Respite budget. If not specified claim will automatically come out of your IF/EIF/EGL/DHB/MSD budget.
- Please submit your claim by midday on a Monday in line with the payments schedule. Funds are generally cleared in your account on the following Wednesday.
- Claims submitted after this time will be processed on the following Friday and will generally be cleared in your account the next day.
- You must have a receipt or invoice to match each item claimed.
- Claims for expenses in excess of \$500 or for IT equipment such as computers, phones, printers must be approved prior to purchase and be accompanied by a receipt when claiming.
- Please use the submit by email button or email this Expense Claim Form to: [accounts@manawanui.org.nz](mailto:accounts@manawanui.org.nz).

The following is an example of the information expected on expense claims:

### Example

Person Receiving Funding


Fortnight Ending

Agent's Name

Today's Date

Date	Name of Person or Organisation (check if respite)	Address	Phone	DOB	Total Hours	Amount
19/12/2020	Sarah Jones <input type="checkbox"/>	1 ABC Street, Auckland	023 1234567	1/1/1989	6	120.00
20/12/2020	William Trust <input checked="" type="checkbox"/>	99a Alphabet Cres, Auckland	023 1122334	2/2/1990	17	272.00
21/12/2020	ABC.org <input type="checkbox"/>	111 XYZ Ave, Auckland	09 9876543			220.00

Date	Other expenses - description of expense (you must keep a receipt for these)	Amount
21/12/2020	Gloves for support worker	12.45
21/12/2020	First aid training for W. Trust	130.00

Signature		Total	754.45
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# Timesheet

Person Receiving Funding\*

Employees Name\*

Agent's Name

Fortnight Ending\*

Client Code\*

Day	Date	Total worked and leave hours				
		PC	HM	Night	Respite	Other
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
Saturday						
Sunday						
	TOTAL HOURS					

Day	Date	Total worked and leave hours				
		PC	HM	Night	Respite	Other
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
Saturday						
Sunday						
	TOTAL HOURS					

Category	PC	HM	Night	Respite	Other
Grand Total - Fortnight					

Date	Name of Person or Organisation (check if respite)	Address	Phone	DOB	Total Hours	Amount
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
Date	Pay expense to	Details of expenses				Amount
TOTAL CLAIMED EXPENSES						
<b>Declaration by worker:</b> I hereby verify that the hours on this timesheet were worked by me during the week shown above.		Signature		Date		
<b>Declaration by person receiving funding or their agent</b> 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, and I have made, and will retain, full records supporting this claim. I will make these records available for audit on request.		Signature		Date		



# Manawanui

PO Box 83, Albany Village,  
Auckland 0755

0508 462 427

[info@manawanui.org.nz](mailto:info@manawanui.org.nz)  
[www.manawanui.org.nz](http://www.manawanui.org.nz)

