



Marsha Marshall - Chief Executive Officer

Hi everyone,

This newsletter will be dedicated to the **Pay Equity Settlement implementation requirements**. I understand that many of you may find these communications repetitive – however it is CRITICAL that you understand the requirements. I have posted a video on our website, and we have a dedicated page with all the information and forms you need to action any increases you have to give your staff.

THE NEW PAY RATES ARE **MINIMUM** WAGE RATES AND ARE **THE LAW**. YOU MUST BE PAYING ACCORDING TO THE NEW RULES OR YOU COULD BE SUBJECT TO A PERSONAL GRIEVANCE.

The absolute minimum you can pay your support people is **\$19 per hour**. If they have a qualification and/or more than 3 years of service the rate goes up. The matrix outlining what you have to pay and a pay band & rate calculator can be found at <http://www.incharge.org.nz/pay-equity-implementation/>.

You must let us know as soon as possible any changes to your employees pay rate. You can do this easily by completing the online form at <http://www.incharge.org.nz/pay-equity-wage-change/>

There is good news however! The Ministry of Health has increased the IF rate from \$26.40/hour to \$30.43/hour to cover the increase cost of paying your people. This will be applied to the remainder of your allocation.

Also – you no longer need to pay the percentage fee to us – the Ministry will pay us separately. In the future you will only need to pay us if you use our Payroll Service (\$15/fortnight regardless of how many pays we process for you), or for any additional services such as planning.

So the end result is that you will have the full \$30.43 (minus \$15/fortnight for payroll) to apply to the cost of your support. Once again this information is on our website and you will have received an email from us explaining it.

EIF/EGL/IF Respite funding

There will be an equivalent increase with a slightly different calculation for IF Respite, EIF and EGL as these funding schemes use \$10 units. The Ministry will recalculate IF Respite, EIF and EGL (excluding MSD) budgets for each person and send them to us as soon as possible after 3 July. Please note for EGL; MSD and MoE funding is not currently included in the settlement.

DHB funding

If you are a DHB client, you will also need to increase the rates according to years of experience or qualifications. The same pay bands/rates apply to support workers under DHB funding as other disability funding. You can work out what pay band/rate your employee should be on by using our budget tool or the table on <http://www.incharge.org.nz/pay-equity-implementation/>. It is likely DHBs will follow a similar pathway as the Ministry of Health

in terms of covering the costs of this pay rise. We will communicate directly with DHB clients when we have more information from their specific DHB.

If you have questions about this please go to <http://www.incharge.org.nz/pay-equity-qa/> or call our Help Desk on 0508 462 427. We have staff specially assigned and briefed to answer your questions.

Next month we will talk about something else – we HOPE!

Marsha



Claire Ryan - National Services Manager

Greetings from the Coaching Team,

As you will know there have been quite a few changes to the team. Below is a list of which Coach is responsible for which area:

- Shelley Pilgrim is the Coach for Southland/Central Otago/South Otago/Ashburton
- Peggy Aerts is the Coach for Canterbury/Kaikoura/Marlborough/Nelson/West Coast
- Karen Jeffrey is the Coach for Wellington/Kapiti/Wairarapa/Manawatu/Hawkes Bay
- Yvonne Halliday is the Coach for Taranaki/Whanganui/Lakes/Waikato South/Gisborne
- Debbie Davidson is the Coach for Waikato/South Auckland/Bay of Plenty/Thames/Coromandel
- Kim Parker is the Coach for Auckland and Northland
- Andy Walford has left Manawatu to take up a position with Mental Health Services so Debbie Davidson will take over his area.

Queries – unless you are new with us (this means under 3 months) then your queries are going to be best handled by our Helpdesk (**0508 462 427**). We have four Helpdesk Consultants who all have previous Coaching experience as well as experience in Payroll and Accounts. Please do call them and they will be able to assist. You can reach them on **0508 462 427** or by emailing helpdesk@incharge.org.nz. We are aiming for a “first call resolution” policy.

If you are unclear about any of this then please feel free to contact me by e-mailing claire@incharge.org.nz.

Claire

Client Statement Guidelines

Please find attached Manawanui's client statement dated 31 May 2017. The reimbursement, payroll and fees transactions on the statement are backdated by 14 days; therefore the statement includes transactions up to and including the 14th June 2017.

Please note that not all of the following guidelines may apply to your particular circumstances.

- 1 Mailing Address and e-mail Address – As personal information is continually changing please contact us if you have moved, changed your e-mail address or if any information on this statement is incorrect.
- 2 NASC Review Date – This is the date that this current funding period will cease. If this date is within two months, then you will need to contact your local NASC to organise a review of your funding.

Features

- 4 The client statement shows two columns with figures relating to both the **Funds spent for the month** (left hand column) and the **Total Funds allocated and spent for the funding period** (right hand column), up to the **Statement Date**.
- 4 Statement Month (left column) This column shows the total amount spent for each item for the current month. The figure above the heading "**May 2017**" is your total balance as at the date of your previous statement or if this is the first statement of your new funding allocation will be the same as the total funds shown at the top of the right hand column.
- 6 Expenses Paid – Depending on which payment method you use, this figure will be a total of either the Payroll or Reimbursement amounts paid in the statement month. (If you have changed your payment method within the funding period you may have a figure under each of these).
- 7 MIC Fees – This is the amount of Manawanui Fees you have paid for this statement month.
- 8 Liability Insurance – If you have opted to take out Liability Insurance through Manawanui and we have paid your premium this month, it will be reflected here.

Money Saved for Future Payments

These are the amounts which are deducted for payments that will occur in the future and Manawanui will pay for you as they arise.

- 9 ACC Accrual - This is the amount of ACC accrued and deducted for this month.
- 10 Holiday & Alt Hol Pay Accrual (to 30/09/16) – This is the amount of holiday pay and alternative holiday pay that was accrued in the past for your employees. The total will be a negative as the balance was transferred to a different account (next item).
- 11 Holiday & Alt Hol Pay Accrual (from 01/10/16) – This account now has the total amount of holiday pay and alternative holiday pay that is owed to your employees. It will also show the total for the month based on the sum of the weekly accruals.
- 12 Funder – This is the source of your funding allocation. If you get multiple statements, they will likely have different funder names at the top of the front page.

Additional Funding Received – If you have an amount showing for this and you are unsure what it means, please contact your coach.

13 Funding Period (Right column)
This column shows the total amount spent for each item for the current funding period.

14 Total Funds Allocated by NASC for this Funding Period – This is the total amount of funds allocated to you by the NASC for your current allocation period.

All figures in this right hand column relate to your total amount of funding used **since your current NASC allocation began**. As for the monthly totals, the categories are the same: Reimbursement or Payroll, Manawanui Fees, Liability Insurance, Holiday Pay and ACC.

Explanation of Totals

15 Total Funds Spent this Period – This is the total of all the figures in the left column.

16 Total Funds Spent – This is the total of all the figures in the right column and is a total of all funds spent since your current NASC allocation began.

17 Total Funds Remaining – This is the balance of your current allocation up to the date of this statement (if you have overspent your current allocation there will be no remaining balance entered here).

18 Total Funds - Overspent – This will show a negative figure (in red) if you have exceeded your current allocation.
(Please note, if you have an overspent amount on your statement – please ensure you contact your IF Coach urgently for further assistance)

19 Total Holiday and Alternative Holiday Pay Accrued as at – This is the total amount of holiday pay and alternative holiday pay that is owed to your employees as at the date stated on the right of the statement.

Client statement budget transaction records

Details of each transaction are shown and described on the next two pages of this document.

Client Statement

12 Ministry of Health

To: 1

Client Name:

Client NHI:

Current Funding Start Date: 18/03/2016

Email Address: 1

Client Code:

Statement Date: 30/10/2016 3

NASC Review Date: 16/03/2017 2

Total Funds Allocated by NASC for this Funding period: 4

Funding Remaining from Last Statement

Expenses Paid

Payroll

Reimbursement

MIC Fees

Liability Insurance

Money Saved For Future Payments

**ACC Accrual

**Holiday & Alt Hol Pay Accrual (to 30/09/16)

**Holiday & Alt Hol Pay Accrual (from 01/10/16)

Other Funding Received

Additional Funding Received

15 Total Funds Spent This Period

16 Total Funds Spent

17 Total Funds Remaining

18 Total Funds -Overspent

		14 \$50,000.00
	\$46,696.69	
5 October 2016		Total to Date
6 \$495.43		\$3,966.54
\$0.00		\$0.00
7 \$40.63		\$325.26
8 \$0.00		\$0.00
9 \$6.84		\$55.64
10 \$0.00		-\$214.76
11 \$392.68		\$392.68
	\$0.00	\$0.00
	\$1,215.19	
		\$4,518.50
		\$45,481.50
		\$0.00

** Please note that these figures are indicative only

19 Total Holiday and Alternative Holiday Pay Accrued at 30/10/2016 \$392.68 (this amount has already been deducted from your funding)


20 ACC Accrual

Before October, each item under this heading is the amount of ACC saved (accrued) to pay ACC employer levies from your funding each month. From October we have started accruing for ACC each week. So you are now able to see how much ACC has been 21 accrued for each week of payments. The total of these is the same as the total amount for ACC accrued on page one of the statement. 9

22 Holiday & Alt Hol Pay Accrual (to 30/09/16)

Each item under this heading is the balance of holiday pay and alternative holiday pay saved (accrued) at the end of each month. At the end of September, we have transferred the balance of this account to a new holiday pay account (next item). You will therefore now see a zero amount on 30/09/2016. 23

24 Holiday & Alt Hol Pay Accrual (from 01/10/16)

The opening balance of this account is the transferred amount from the closing balance of the previous holiday pay account. This means you are now able to see how much holiday pay has been accrued for each week of payments. 

26 Payroll

This is the total amount paid per fortnight for support related costs, including any expenses claimed. The 'paid date' (on the right) is the date money is paid in to peoples' bank account(s). The date on the left relates to the pay period in which the costs actually occurred.









27 MIC Fees

For each payroll or reimbursement transaction above, there is a fee. If you look at the date on the left of the payroll/reimbursement transaction you will see a matching fee with the same date.

Client Statement Budget Transaction Records

Client Name:

Budget Period: 18/03/2016 - 16/03/2017

Item Type	Date	Amount	Description
<u>ACC Accrual</u>			
	30/09/2016	\$12.81	ACC Accrual for September 2016 
	09/10/2016	\$6.85	ACC Accrual for week ending 23/10/2016 
<u>**Holiday & Alt Hol Pay Accrual (to 30/09/16)</u>			
	29/09/2016	\$317.32	Holiday Pay and Alternative Holiday Pay Accrual 30/09/2016 
	30/09/2016	\$0.00	Transfer to new Holiday Pay account 
<u>**Holiday & Alt Hol Pay Accrual (from 01/10/16)</u> 			
	01/10/2016	\$317.32	Transfer from old Holiday Pay account
	09/10/2016	\$75.36	Holiday & Alt Hol Pay Accrual for week ending 23/10/2016 
<u>Payroll</u>			
	21/09/2016	\$546.18	Paid 05/10/2016
	05/10/2016	\$495.43	Paid 19/10/2016 
<u>MIC Fees</u>			
	21/09/2016	\$44.79	Payroll Fee
	05/10/2016	\$40.63	Payroll Fee 

If May is your NASC review month

If your funding has been reviewed during May, you will receive 2 statements for May, one showing the expenditure (if any) recorded against your (now) old allocation and a second statement showing the expenditure (if any) for your new funding allocation.

If you have specific questions about your client statement please contact your IF coach via our free phone line 0508 IFCOACH (i.e. 0508 432 622) or email us at info@incharge.org.nz