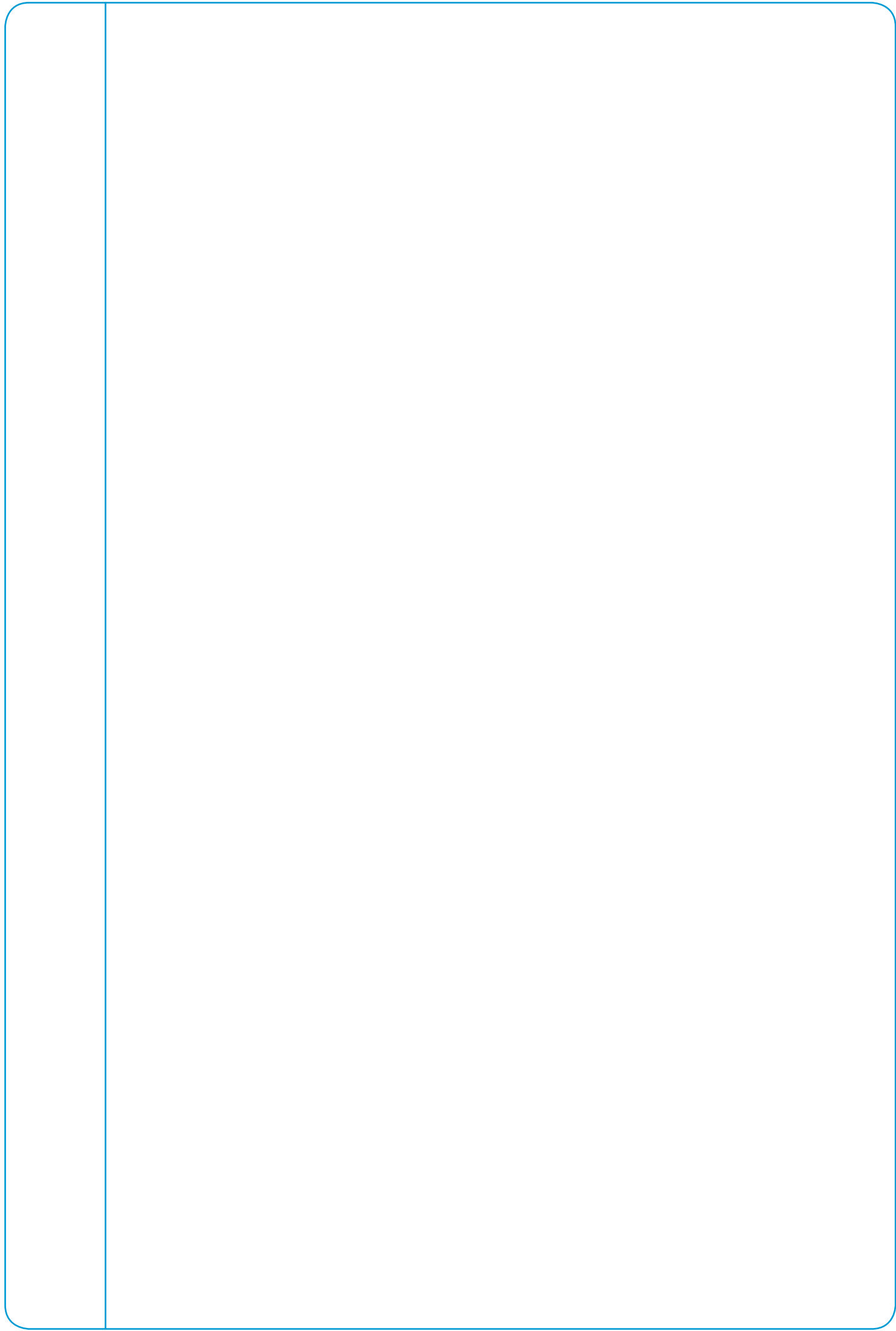


Self-management guide book

Giving you control over your day-to-day support





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1. Welcome to self-management

1.1 What is self-management?

Self-management gives ACC clients with a disability more choice and control over how they manage the services and supports they need for everyday living.

As well as greater independence, self-management gives you the flexibility to get what you need, when you need it. That's because you manage your own budget to buy supports and services yourself, rather than ACC buying them for you.

Self-management may suit you if your needs and circumstances have been the same for some time and are expected to remain the same.

You'll be supported by your coordinator. They'll also continue to approve your funding for some equipment and services that are outside the self-management programme.

We're here to help you every step of the way.

1.2 Who is this guide book for?

This guide book is for you, if your coordinator has confirmed that self-management is right for your injury-related needs. It's also helpful for family/whānau members and other people supporting you with your care. The guide book is a 'how to' to get you started. You can also refer back to it when you have any questions about how self-management works.

In this guide we use words and phrases related to self-management. You can refer to section nine to find out what they mean.

1.3 What's in this guide book?

This guide book will tell you about:

- how to get started
- what you can and can't buy
- choosing who to buy services and supports from
- how to manage your funds

- making changes to your plan
- your rights and responsibilities
- where you can get more information.

It includes guidelines that will help you decide which suppliers you'd like to use. It also tells you what to do if you have a problem with your self-management programme.

1.4 Principles of self-management

Control of decisions

- A client who is self-managing will take control of the decisions about how they meet their support needs. They'll consider and identify what services and supports they require to meet identified needs.

Personal budget

- A client who is self-managing will receive individual personal funding consistent with their level of need.

Funding flexibility

- A client who is self-managing will decide which supports they want to self-manage. They'll be able to transfer the funding they receive between different types of disability supports and services.

Clear systems and rules

- Guidelines and rules for how self management works are clear, understandable, simple and inclusive.

Shared accountability

- A client who is self-managing and ACC both have a responsibility to each other to act in good faith, explain their decisions, and share what they have learnt.

Support to self-manage

- A client who is self-managing will have access to tools and support people to ensure they can make informed decisions about what to buy to achieve their goals.

Flexibility and responsiveness

- Where any self-management arrangement is putting a client at undue risk or failing to meet their needs, ACC will support the client to reach a resolution.

1.5 What's next?

It's time to look at how to get started.

2. Getting started

2.1 Your pathway to self-management

How do you know if self-management is right for you?

Firstly, follow the self-assessment sheet 'Will self-management suit me?' This will help you decide if self-management will suit your needs.

Next, have a chat with your coordinator. They'll be able to confirm whether you're ready for self-management or not. If you're not ready yet, they can work with you towards getting ready.

If you're ready to self-manage some of your services and supports, then arrange a time to meet your coordinator to discuss how self-management will work for you and set your plan for the next year.

Before meeting with your coordinator it's worth considering:

- what are your goals in terms of your health and wellbeing for the next year, and how would you like to achieve those goals?
- what types of supports and services that you're currently receiving from ACC would you want to self-manage?

You don't need to make a decision at this point, but it's worth considering if you'd feel comfortable buying your own equipment, for example.

Also think about who you'd like to take with you to the meeting. It may help to have family/whānau members or support people there, to make sure your plan works best for you all.

2.2 Setting a plan with your coordinator

Your plan will be based on the supports and services you've had in the past. Your coordinator will have all the information and tools to help set your plan.

At the meeting, you'll decide which parts of your package of everyday supports and services you want to manage yourself.

You'll also agree with your coordinator on a total amount of money you'll need for the services and supports you'll be managing yourself for the next 12 months. This amount will be based on what has been spent on your needs in the past.

Your coordinator will type up the plan you've discussed, including who will manage what.

You'll then have the opportunity to read through the plan and discuss it with your family/whānau or other people who support you.

2.3 Agreeing to self-manage

If you want to go ahead with self-management, you'll meet with your coordinator again to sign an agreement.

The agreement says that you and ACC will act in good faith towards each other. This means that you'll only use the funds for your disability-related needs.

We agree to support you to get ready and start self-managing. This means your coordinator will help you set your plan and give you information you need, when you need it, so you can put your plan into action.

Self-management is not about reducing your overall funding or limiting your access to the people who support you at ACC. It's about helping you to make your own decisions about your day-to-day needs, because you know your needs best.

2.4 Getting ready to self-manage

There are three things you'll need to do to get ready to self-manage some of your services and supports.

1. Get the financial know-how you need

Talk to your coordinator about training you may like to do, like a budgeting course.

2. Decide how to keep your records

You'll need to decide how you'll keep records related to your self-management purchases – see the requirements for managing your records in section four.

3. Set up a Westpac bank account for your funding. ACC has view-only access to this account, but it is in your name.

2.5 Your pathway to self-management



*Michael's journey**

**This is a fictional account of how self-management works for someone.*

Michael was injured 25 years ago in a car accident that damaged his spine. He likes the idea of making more of his own decisions, so he talks to his coordinator, Sarah about how self-management could work for him. Sarah runs through a few questions with Michael and she decides self-management would suit some of his needs.

Sarah goes to Michael's home to discuss self-management with him and his family. They all support Michael because they know he wants more independence. To help set Michael's self-management plan, Sarah has a report showing what ACC has funded for Michael over the past two years. She has a copy of Michael's Support Needs Assessment. She also has lists of the equipment he uses, as well as a price list so they can plan how much money Michael will need.

Michael wants to buy his own disposable gloves, but he is happy for all other consumables to be purchased by ACC the way they are now. He decides he would like to buy the replacements for his small equipment items, and he wants to self-manage his podiatry treatments. He's also due to go to Burwood for a check-up in six months and he would like to book his own travel.

Sarah writes up the plan they've discussed and sends it to him to review. Michael is happy to go ahead, so he signs the agreement and makes a time to see Sarah again so she can help him get ready to self-manage.

2.6 What's next?

It's time to work out what you can and can't buy with your self-management funds.

3. What you can and can't buy

3.1 Guidelines for using your funds

There are two criteria to meet for using your funds:

1. The money is spent on injury-related services and supports. (These are things you only need because of your injury-related disability).
2. The services and supports contribute to an outcome in the plan you set with your coordinator.

There are some other important things to note when self-managing your funds:

- services and supports should be the most cost-effective and relevant way to support you to achieve outcomes identified in your plan
- if you require funding in line with your cultural needs, please discuss this with your coordinator before progressing
- funds are not income for you (like money you might get from work or a pension).

3.2 What you can spend your funds on

Your funds can be used for:

- Injury-related supports and services identified in your plan, such as:
 - attendant care for personal care tasks like showering and dressing (see separate guide book for information about including care in your self-management funding)
 - home help with tasks like cooking, laundry and cleaning (see separate guide book for information about including home help in your self-management funding)
 - child care (see separate guide book for information about including child care in your self-management funding)
 - medical consumables like surgical gloves or wipes
 - small equipment items valued up to \$1,000

- equipment maintenance and repairs
- travel expenses related to your injury
- regular day activity programmes related to your injury
- podiatry services
- pharmaceuticals.

What you buy within these categories is up to you, as long as it's for your injury-related disability and is within your budget.

There is also flexibility to use funds. For example, if you save money on a piece of equipment, you could put the money you saved toward getting another piece of equipment.

3.3 What you're unable to spend your funds on

Your funds are unable to be used for:

- services and supports funded by ACC that are outside the self-management programme (if you need any of these they'll be in your plan and your coordinator will organise them for you), including:
 - house and vehicle modifications
 - treatment costs (excluding podiatry)
 - weekly compensation or independence allowances
 - artificial limb purchases
 - supported living/employment and transition costs
 - large equipment items, such as wheelchairs or hoists
 - advocacy
 - assessment.
- Everyday living costs that are not related to your injury and you currently pay for yourself, such as:
 - bills like electricity, gas, telephone and internet costs
 - general household fittings, furniture and white goods
 - food, groceries and other household goods
 - mortgage payments, rent or rental assistance
 - general vehicle purchase or maintenance
 - house and contents, vehicle and life insurance
 - personal advocacy services
 - repayment of personal debts

- other non-injury related services, such as legal advice.
- services or supports that are already funded by another government agency.
- hearing aid purchases from the internet.
- anything that is illegal.
- gambling, alcohol, or tobacco.

3.4 What to do if you want to buy something that isn't in your plan

You can make a change that's within your package of care. For example, you can substitute a support or service with another one based on a need identified in your plan. See section six for more details.

Or, talk to your coordinator if you need to buy something that's not in your plan and so is outside your package of care. For example, if you need to buy an additional support or service on top of what you are already receiving.

Michael's journey continues ...

Michael is now ready to start self-managing and he's looking forward to it. He knows what's in his plan, so he's fairly sure what he can and can't buy. He also knows Sarah is there if he needs help.

He's pretty clear that he can't use it for his groceries and anything funded by another agency, and that makes sense to him anyway. Michael knows there are some things outside his self-management package that ACC will still do for him. He needs a new wheelchair, so ACC will organise and pay for that when the time comes.

3.5 What's next?

It's time to find out how you'll receive your funds.

4. Managing your funds

4.1 Setting up your bank account

Your coordinator will help you fill out the Westpac banking forms and send them to Westpac for you.

We'll contribute \$3.50 a month toward the cost of the bank fees, which are not charged if you choose to cancel the paper statements that are posted to you. There are no fees for electronic transactions. We will not pay fees for manual transactions, e.g. manual deposits, cheques etc.

You'll need to give ACC authority to view the transactions on this account. Your coordinator will give you all the forms to do this.

Your coordinator will be able to view the account transactions online. This is so it's easy to see that all your purchases are injury-related.

If you've got any questions about setting up the account, call Westpac's service direct team on 0800 221 082 or email them at servicedirect@westpac.co.nz to set up your self-management account.

Your funding will be deposited into your self-management bank account either as a lump sum or weekly, depending on what the funding is for. You can talk about payment options with your coordinator.

4.2 Managing your bank account

You should only use your self-management account for transactions related to self-management. You will continue to use your current personal bank accounts for all your personal spending. This will ensure coordinators only view transactions you've made for your injury-related needs.

You may need to transfer money between your accounts to make a purchase. For example, you may decide to buy an item that costs more than you have been funded for. In this case, you could decide to put your self-management funds toward the purchase and transfer funds from your personal account to pay the difference. We recommend that if you are transferring funds between your online accounts that you

insert details in the 'Particulars' field, so your coordinator knows what the transfer is for.

If you don't have enough funds in your account to cover a purchase or you're worried you're not using your funds and they are building up in your account, talk to your coordinator.

4.3 Managing your records

You need to keep a record of your:

- receipts for all pharmaceutical purchases
- receipts for all other purchases over 50 dollars
- equipment and the date it was purchased
- warranty documents for your equipment.

You may be asked to show your coordinator your records at any time, so keep them up-to-date and in a safe place.

Michael's journey continues ...

Michael sets up a Westpac bank account to receive ACC funding and Sarah checks Michael's bank transactions so she can see how he's managing his funds. Sarah gives Michael a call to check how he's going and to ask why he's spent some money at the local supermarket. Michael explains it's for gloves – they had a good deal on them and he saved some money.

Michael decides to make sure his records are easy to keep up-to-date, so he has a file box for his receipts. In the box, he has a notebook where he's listed all the equipment he has and how old it is. He'll add to the list whenever he buys a new piece of equipment. Other documents, like his self-management Westpac bank account statements and warranties for his equipment are kept in the box too.

4.4 What's next?

It's time to find out who you can buy services and supports from.

5. Choosing who to buy services and supports from

5.1 Who can you buy services and supports from?

You can choose any supplier you want to provide your services and supports.

We recommend you choose suppliers that:

- will help meet the objectives in your plan
- have a good reputation
- have good business practices
- offer warranties on equipment goods.

We suggest you:

- shop around and get a couple of cost estimates before you decide which suppliers you want to use
- get someone else to check any supplier contracts or agreements before you sign them
- keep copies of the contracts you've signed, so you know what you have agreed to.

Some other advice:

- keep an eye out for additional charges that weren't specified when you signed the contract
- only pay for what you need. Some suppliers may encourage you to buy additional services you may not need and are quite costly
- don't be tempted to buy something that seems too good to be true. If a deal seems too good to be true, it probably is.

For more information about your consumer rights, visit:

<http://www.consumeraffairs.govt.nz/>

5.2 How to choose a supplier

Choosing suppliers is both your decision and your responsibility. Your coordinator can help you to get information to make decisions about who can provide the services and supports identified in your plan.

Some of the questions you should ask any supplier are:

- What type and nature of services or supports can they provide?
- What are the costs?
- What will your responsibilities be?
- What are their hours of service? Do they have a call centre or emergency call-out, if required?
- What are their timeframes for responding to your requests – will they respond within an hour, 24 hours, or longer?
- Do they have adequate insurance to cover their worker if they are injured while at your home?
- Do they have a complaints process that you understand and feel confident about?

5.3 Equipment repairs

Repairs to your equipment must be done by an authorised repair agent so that the warranty for the equipment is protected.

Check with the manufacturer of the equipment – they can tell you who is an authorised repairer.

5.4 Guidelines for buying pharmaceuticals

You use your self-management funds to buy the pharmaceuticals you have been funded for in your self-management plan.

We will follow the same process for approving injury-related medications. We will continue to contribute five dollars for each prescription, for a maximum of 20 prescriptions a year.

You can make choices, in consultation with your doctor, about the types of pharmaceuticals you receive and whether you get them as pills, liquids, or creams. If the cost of an item is more than five dollars, you can choose to pay for the difference yourself to get the medication you prefer, in the form you prefer, as prescribed by your doctor.

You cannot buy pharmaceuticals from overseas – this is a legal requirement for using ACC funds. However, you can buy pharmaceuticals from New Zealand-based internet pharmacies.

Here are some other guidelines for buying pharmaceuticals:

- ask for your community services card or high use health card (if applicable) to be recorded in your pharmacy's dispensary system
- ensure that the dispensing pharmacy is recording the number of items dispensed and accessing prescription subsidy cards that apply when a patient/family receives 20 items between 1 February and 31 January each year
- ask pharmacies to itemise costs and to tell you of any items that cost more than five dollars
- make sure you keep all receipts for pharmaceutical purchases using your self-management funds.

Michael's journey continues ...

Michael needs to replace one of his small equipment items. He's not sure who to buy the equipment from, so he calls Sarah to ask her advice. Sarah gives Michael a couple of options to choose from and he then gets some quotes and chooses a supplier. When the equipment arrives, he puts the receipt and warranty document in his file box, and writes the details about his new piece of equipment in his notebook.

Michael's podiatrist is moving overseas so Michael needs to choose a new one. It's really important to him to get someone he likes, but he also wants to make sure he gets a good deal. He asks his GP for some recommendations and then checks the Podiatry New Zealand website to see who the members are in his area. He calls a few podiatrists to ask about their services and their costs before making his decision.

Michael also needs to get a piece of his equipment repaired so he calls the manufacturer to find out who is authorised to do the repairs. That way he has peace of mind that the equipment will be covered by its warranty in the future.

5.5 What's next?

It's time to look at what's involved in making changes to your plan.

6. Making changes to your plan

6.1 Changes you can make at any time

You can make changes at any time if:

- you want to swap something in your plan with something else for your injury-related needs and you have the funds in your self-management account to pay for it.
- you are not happy with a supplier you've chosen.

6.2 Changes you need to talk to ACC about

You need to talk to your coordinator first if you want to:

- increase your support package
- change the way you receive your funds
- have an assessment so you can buy a new piece of equipment
- talk about a problem with your health or wellbeing
- opt-out of self-management.

6.3 Unexpected changes

If your circumstances change at any time, or something making self-management difficult for you, talk to your coordinator. They'll be happy to discuss your situation and explain how ACC can help.

If you find that self-management is more than you want to do right now, talk to your coordinator about opting out until you feel ready to start up again.

Michael's journey continues ...

Michael needs to buy a piece of equipment that he and Sarah identified in his plan would need replacing this year. However, he decides he doesn't want to buy the same piece of equipment he's had before. He wants a different piece of equipment that does the same job, but is more expensive. He's managed to save a bit of money over the past few months. Michael decides to buy the new piece of equipment, but first he calls Sarah so ACC can arrange and pay for an assessment so the equipment can be custom-fitted. Michael's really pleased with the result. He's really proud that his idea and budgeting skills mean he's now got something that's going to make his life easier.

6.4 What's next?

It's time to find out how your coordinator will track your progress over the year.

7. Tracking your progress

7.1 Starting out

During the first three months, your coordinator will check in with you at least once a month to see how things are going.

At six months, if self-management is working well for you, your coordinator will monitor your spending. They may ask at any time to see your records to check that you're still on track.

7.2 Your annual review

Before the end of 12 months, you and your coordinator will discuss your needs for the next year. You can decide to continue with your self-management plan or not, and you can choose to add more services and supports to self-manage.

7.3 What happens to unspent funds?

Your coordinator can view your Westpac bank account to check everything's going well.

If you have a large amount of unspent funds in your account, they'll talk to you to make sure your plan still fits your needs.

You can use your unspent funds to buy injury-related supports or services, as long as they're within the guidelines – see section three.

7.4 What happens if you spend all your funds?

Talk to your coordinator if you've spent all your allocated funds before your 12 month review period and you still have purchases in your plan that you need to make. We'll need to know why you don't have sufficient funds. If you've been under funded, you may be allocated more funds based on your needs.

If you're struggling, your coordinator can help you get the support you need. You and your coordinator may decide that self-management is not for you and ACC will manage your supports as we did before.

If you've mismanaged your funds by spending them on things unrelated to your injury needs, you'll be asked to pay ACC back. You'll be removed from the self-management programme and ACC will continue to manage all your supports and services as we did in the past.

Michael's journey continues ...

Looking back, Michael was glad he decided to self-manage some of his supports. He admits he was a little nervous to start with, but once he was set up he was surprised how easy it all was. He found Sarah really helpful - she rang him several times in the first few months to encourage him and provide some suggestions for things he might consider. She was also available whenever Michael got stuck and needed some help, or wanted to organise an assessment.

After six months, Sarah could see that Michael was doing well, so she let him run his self-management package and tried not to bother him unless she had a concern about his Westpac bank account. Michael liked the fact Sarah let him get on with it. He really likes being able to make his own decisions and the new skills he's picked up along the way.

When Sarah called after 12 months to see what Michael wanted to do, he said he'd like to do the same again next year. Sarah took care of the paperwork so Michael could continue his self-management journey.

7.5 What's next?

It's time to find out about your rights and responsibilities.

8. Rights and responsibilities

8.1 Your rights

The Code of ACC Claimants' Rights aims to make sure we provide you with a high standard of service by:

- treating you with dignity, respect, honesty and courtesy. We understand you may be finding everyday life hard (physically, emotionally, socially, financially)
- treating you fairly and listening to you and your views. We'll respect any impairment you may have
- respecting your culture, values and beliefs
- welcoming any support person(s) you bring with you
- communicating with you openly and honestly. We'll answer your questions and give you information quickly, and we can also help to provide an interpreter
- keeping you fully informed. We'll give you information about the types of help we provide, how to apply and how long things may take. We'll tell you about your entitlements and responsibilities, and let you know if these change. We'll tell you about your options to review or appeal a decision we make
- respecting your privacy, and letting you see and correct the information we hold about you
- respecting your right to complain. We'll work with you to find a solution. We'll tell you about the options for resolving issues and how long it's likely to take.

If you want a copy of the full Code of ACC Claimants' Rights, ask your coordinator.

8.2 Your responsibilities

Your responsibilities include:

- negotiating and arranging the services and supports you need as agreed in your plan and budget
- checking the quality of the services and supports you receive

- checking that the invoices you receive from suppliers are correct (this means that you received the services or supports stated in the invoice and that the cost is what you expected to pay)
- ensuring all purchases from your Westpac self-management bank account are for your injury-related needs
- budgeting to ensure you have sufficient funds to make a purchase
- making sure you meet all the tax and legal requirements of an employer (if you are employing carers)
- paying suppliers and keeping receipts for all your purchases
- keeping an up-to-date list of all your equipment (and when it was purchased)
- ensuring equipment repairs are carried out by an authorised repair agent
- keeping ACC informed about any changes to your circumstances
- ensuring you don't buy pharmaceuticals from overseas suppliers
- telling ACC if you intend to be overseas for more than 28 days
- discussing your self-management plan with your coordinator at the end of 12 months deciding on what you want to do for the next year
- providing records to ACC when asked
- letting ACC know that you no longer need services or supports. (This can be done by a family/whānau member or support person if you are not able to).

8.3 ACC's responsibilities

ACC will support you throughout your transition to self-management. Your coordinator will:

- confirm if you're ready to self-manage or not
- help you get ready to self-manage if you're not ready yet
- meet with you to set your self-management plan
- bring your case information and budget tools to the meeting to help set your plan and the amount of money you'll need for 12 months
- write up your plan for you to review
- give you an agreement to sign
- provide information to help you decide how you'll receive your funds
- give you advice about keeping your records
- let you know about courses you can do, such as budgeting courses
- check in with you at least once a month for the first three months to see how you're going

- be available to answer your questions during business hours Monday to Friday, and respond to your phone calls and emails within 24 hours.
- advise you about what you can and can't buy with your funds
- advise you how to set up your self-management Westpac bank account
- make sure your funds are deposited the way you requested them to be
- monitor your self-management account
- discuss your options if you want to increase your support package
- help you if you want to change the way you receive your funds
- arrange an assessment (for example, if you need to buy a new piece of equipment)
- help you if you're having problems with your health and wellbeing
- help you if your needs have changed or you want to opt-out of self-management.

8.4 What to do if you have a problem

Talk to your coordinator if:

- your health and wellbeing needs are not being met
- you are finding self-management doesn't suit you
- you don't have enough funds in your self-management account to make a purchase.

If you have an issue with something we've done or a decision we've made, please call 0800 101 996 to request a copy of ACC's 'Working together to resolve issues'.

8.5 What's next?

It's time to find out where you can get more information.

9. Where to get more information

9.1 About self-management

Call your coordinator on 0800 101 996 during business hours Monday to Friday.

9.2 About suppliers in your area

With self-management, you choose the suppliers you want to provide your supports and services. To help get you started, your coordinator can email or post you a list of ACC contracted supplier but you don't have to choose a supplier from this list.

Your coordinator can also put you in touch with organisations that know about the supports and services available in your local area.

9.3 Other useful information

Query	Where to go	Website/phone number/ email
ACC levies	ACC Business Service Centre	http://www.acc.co.nz/ 0800 222 776
Setting up your self-management bank account	Westpac Service Direct	0800 221 082 servicedirect@westpac.co.nz

9.4 What do the words mean?

In this guide we use words and phrases related to self-management. Here's what they mean:

Annual review Just before you've been self-managing some of your services and supports for 12 months, you and your coordinator will discuss how the year has gone and what you want to do for the next year.

Authorised repair agent A repairer who is authorised to do the repairs on your equipment. It's important to use an authorised repairer to maintain the warranty on your equipment. The manufacturer of the equipment can tell you who is authorised to do the repairs.

Funds The money you receive from ACC that you'll manage yourself to buy services and supports identified in your plan to address your injury-related needs.

Manufacturer The company that makes the item of equipment.

Medical consumables An item required for your injury-related needs that is often used once and then thrown away, such as surgical gloves, and wipes.

Plan This is the plan you and your coordinator will come up with together. It sets goals, identifies your needs and then a budget for the services and supports you will be funded for. This is the same as your current plan (ACC4500 Individual Service Plan).

Receipts A receipt is a proof of purchase. We require you to keep all receipts for self-management purchases.

Records The records we require you to keep include:

- receipts (see above)
- list of your equipment, including the date the equipment was purchased
- warranty documents for your equipment.

Rights The Code of ACC Claimants' Rights aims to ensure that we provide you with a high standard of service. For more, see section eight.

Self-management This is an option that allows you to manage some of your supports and services yourself.

Services and supports These are the things you buy for your injury-related needs, for example, small equipment items and pharmaceuticals.

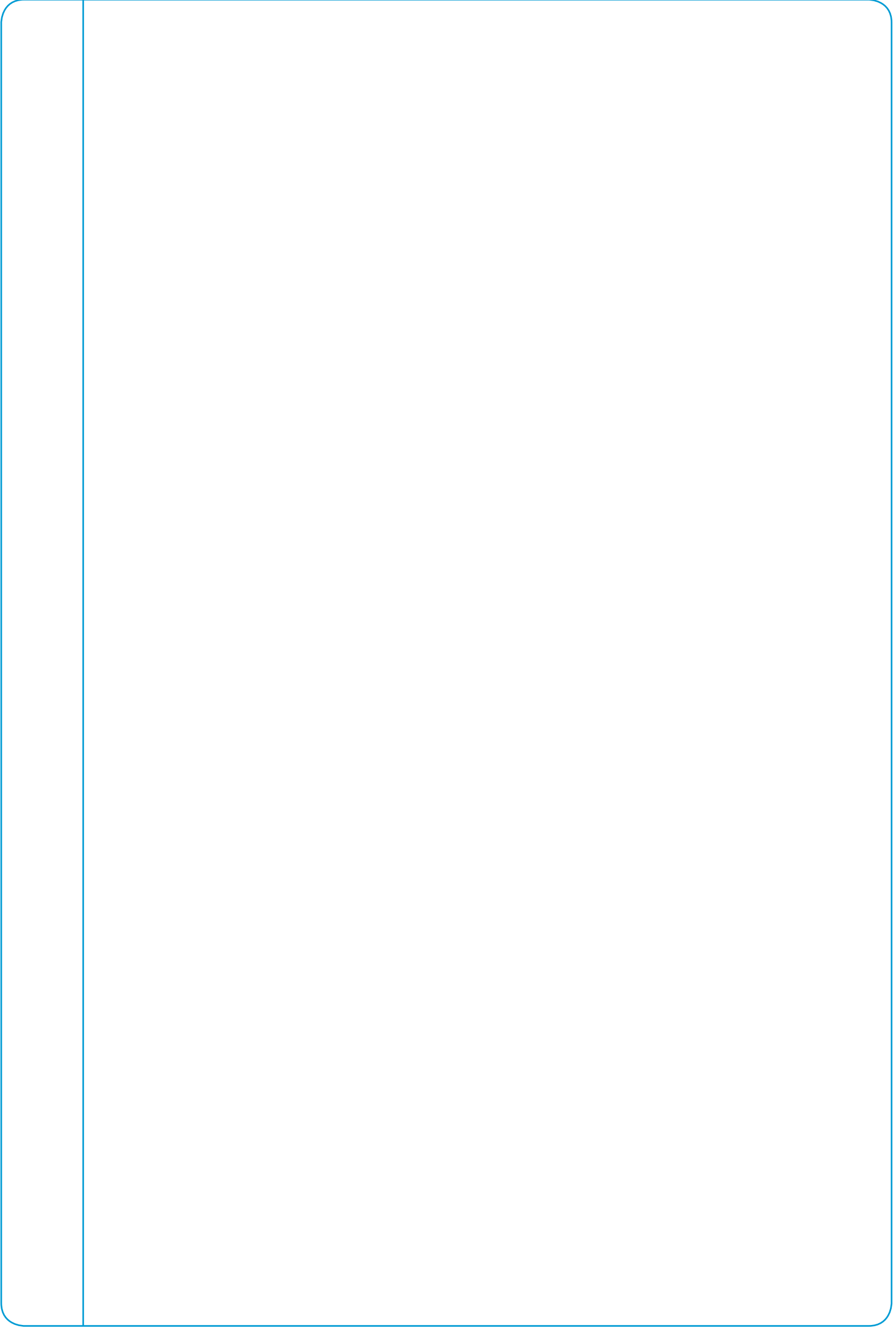
Small equipment items Lower cost (under \$1,000) equipment items such as a shower stool. Custom-fit equipment items will require an assessment. ACC will arrange and pay for this assessment.

Suppliers People and businesses that provide supports and services to you.

Unspent funds Self-management funds left over at the end of the year. For more, see section seven.

Warranty A written guarantee from the manufacturer, promising to repair or replace an item if necessary within a specified period of time.

Westpac bank account You'll set-up a separate Westpac bank account to receive your self-management funds. You'll make all purchases agreed to in your self-management plan from this account. Your coordinator will help you set up the account, and they'll monitor your account to check you're on track with your plan. ACC will pay your bank fees for this account.





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0800 101 996