

## Guidelines to Income Assessment

### WA HACC Fees Policy- Guidelines For Income Assessment of Clients

These Income Assessment Guidelines provide information that providers of HACC support services should follow in discussing the income assessment process with clients.

Under the WA HACC Fees Policy, all clients receiving support funded through the HACC Program are required to complete an Income Assessment Form. These Forms have been provided to Service Providers.

All Service Providers are required to develop a Schedule of Fees. This Schedule should be provided to the client with the Income Assessment Form.

A client can choose not to complete the Income Assessment Form. If so, the Service Provider can charge the maximum fee from their Fee Schedule up to the actual unit cost of delivering the support service.

#### *Steps in Completing an Income Assessment:*

- A client should not complete an income assessment until their need for service is assessed and the quantity and mix of services they will receive is determined.
- The client can complete the Income Assessment Form in whatever way they choose. The form can be left with the client to complete within a specified period and be returned to the Service Provider, or completed with the help of the Service Provider. If the client is unable to provide the required financial information, or cannot complete the form, the person who is their authorised financial representative should complete the form.
- After the form has been completed, the client or their authorised financial representative retains a copy. This avoids the need for the client to complete another assessment if they are to receive services from another Service Provider.

#### *Essential Information for Clients*

The income assessment process and the Fee Schedule need to be explained to the client in simple terms. Important points for service providers to cover are:

1. All clients receiving HACC services complete the standard HACC Income Assessment Form.
2. Clients should be advised whose income details (single or couple) are to be recorded on the form. This advice should be noted in the space provided on the front of the Income Assessment Form. The following Guidelines apply.
  - a) Where a person who is a HACC client is living alone, that person's income is assessed.
  - b) Where there is a couple who are both HACC clients, the couple's income is assessed.
  - c) Where one member of a couple is a HACC client, the couple's income would generally be assessed. Service providers should, however, apply this guideline flexibly depending on individual circumstances.

- d) Where an older person who is a HACC client is living with a family or a carer (other than their spouse), the older person's income should be assessed.
  - e) Where there is a family with a child, or children with disability, aged 16 years or under, who is a HACC client, the parental income is assessed.
  - f) Where there is a family with an adolescent or adult with a disability aged over 16 years, who is a HACC client, the individual client's income is assessed.
  - g) Where there is a household of unrelated people, one or more of whom is a HACC client, the income of the HACC client is assessed and the service should be provided only to support that person.
3. Clients should be assisted by Service Providers to correctly identify their income level.
  4. All HACC funded agencies have developed a Schedule of Fees for the services they provide.
  5. Agencies are required to adhere to the fee cap. This may apply to clients receiving multiple services from one or several Service Providers. The fee cap is reflected in all Agency Fee Schedules.
  6. To assist in applying a fee limit, clients should advise of other HACC services they receive.
  7. If a client's circumstances change their assessed fee may need to be adjusted. Clients should contact their HACC Service Provider quickly if this is the case. A HACC Fee Reduction Form may need to be completed.
  8. Information obtained about a client's income is treated as private and confidential. Written records will be stored securely. Access will be in accordance with the client's expressed permission.
  9. If a client is concerned about any aspect of the fee an appeal can be lodged, either with the HACC Agency or through an advocacy service. Clients should be advised of the appeals process.

*Optional Additional Information for Clients*

10. In most cases, fees are only a small contribution to the actual cost of delivering a support service.
  11. Money raised through fees help to provide more HACC services where they are needed.
  12. Clients who indicate that they do not wish to complete the Income Assessment Form may be charged fees at the highest income level.
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