

Participant Intake Form



AIIM Choices Contact – Phone: 02 6056 6900 or Email: intake@aiim.com.au

1. Participant Details

Participants Name	Title	First name	Surname
Preferred Name			DOB
Phone	Home	Mobile	
Email			
Residential Address			
Postal Address (if Different)			
Language at home other than English			Interpreter required? <input type="checkbox"/> Yes <input type="checkbox"/> No
Preferred option for communication	<input type="checkbox"/> Email <input type="checkbox"/> Post <input type="checkbox"/> Phone <input type="checkbox"/> Other _____		Do you identify as Aboriginal and Torres Strait Islander? <input type="checkbox"/> Yes <input type="checkbox"/> No
Primary Disability			
<p>Is there a Family member or Advocate to support the Participant? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>(If Yes, please detail below)</i></p> <p>Is there a Guardianship and/or Administration order in place? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>(If Yes, please detail below)</i></p> <p>NOTE: For participants under the age of 18 years of age or under guardianship or in the care of family or caregivers please complete below.</p>			

2. Nominated Support Person

Nominated Support Person: 1	Nominated Support Person: 2
<input type="checkbox"/> Advocate <input type="checkbox"/> Parent <input type="checkbox"/> Guardian <input type="checkbox"/> Support Person <input type="checkbox"/> Emergency Contact <input type="checkbox"/> Plan Nominee <input type="checkbox"/> Child Representative <input type="checkbox"/> Other: details _____	<input type="checkbox"/> Advocate <input type="checkbox"/> Parent <input type="checkbox"/> Guardian <input type="checkbox"/> Support Person <input type="checkbox"/> Emergency Contact <input type="checkbox"/> Plan Nominee <input type="checkbox"/> Child Representative <input type="checkbox"/> Other: details _____
Name	Name
Relationship to Participant	Relationship to Participant
Residential Address	Residential Address
Postal Address (if different)	Postal Address (if different)
Home Phone	Home Phone
Mobile	Mobile
Email	Email

3. Your NDIS Plan Contacts

NDIA Planner	Local Area Coordinator/ Early Childhood Coordinator	Support Coordinator
Contact Person	Contact Person	Contact Person
Organisation	Organisation	Organisation
Business Phone	Business Phone	Business Phone
Mobile	Mobile	Mobile
Email	Email	Email

4. Funding

NDIS Number:	
NDIS Plan start date:	

Current funding arrangement?

- Self-Managed
 Plan Managed
 NDIA or Agency Managed
 New Participant

How did you hear about AIIM Choices Plan Management Service?

- Support Co-ordinator
 NDIA Planner
 Friend or Family
 Other _____

5. Supporting your preferences

Do you have any specific preferences? - communication device - contact method/times - cultural/religious - easy read documents - language (written spoken) - other	

Please note: -

- These records are owned by AIIM Choices.
- Information within these records will be shared with other staff within the organisation on and only when staff require the information to carry out their duties
- The participant can ask to see records and receive a copy
- Records are archived for a set period according to AIIM Choices policy and procedures
- All information obtained will be kept confidential.
- This information is used to set up the Service Agreement for Plan Management services
- The Service Agreement is signed off by both the participant/Advocate and AIIM Choices
- A signed service agreement is required to start AIIM Choices Plan Management service support.
- NDIS standard pricing applies for AIIM Choices Plan Management service

		<h2>Questions and Answers</h2>
Area /Questions	Information Details	

<p>Differences between</p> <ul style="list-style-type: none"> Plan Management Self-managed Agency managed 	<ul style="list-style-type: none"> Plan Management, you're in control of services, but there is a separate service to access your funding to pay bills funded through your NDIS plan Self-Managed, you're in control of your services, but you claim monies from the NDIS to pay your NDIS bills Agency Managed, you delegate the control of your services to an agency and they organise and pay for NDIS approved services and contractors <p>For more information please contact the NDIS or www.ndis.gov.au</p>
Can you opt out of Plan Management service agreements?	Yes – you can opt-out of Plan Management services at any time and become either self-managed or move to agency managed. You can stop using AIIM Choices at any time, we are ready to help with any changes. A 14 day notice period is required.
How much does NDIS Plan Management services cost?	<ul style="list-style-type: none"> There is no cost to you The NDIS adds additional funding to you plan to fund Plan Management services Our fee is the standard NDIS fee
What is AIIM Choices Plan Management services and how does it work?	<p>AIIM Choices approach is about you having your own accounting service to take care of paying the bills for services funded from your NDIS plan. The steps are:-</p> <ul style="list-style-type: none"> The participant engages a provider for a service and sets up service agreement. This agreement is sent through to AIIM Choices email accounts@aiim.com.au The participant receives a service from the provider and gets invoiced for the activity If they are happy with the invoice, the participant sends the invoice to AIIM Choices email accounts@aiim.com.au AIIM Choices claims the monies from the NDIS, then pays the invoice for you. All services must be within the scope of your NDIS plan.
Other information and support offered by AIIM Choices.	At AIIM Choices we are here to help if you have and questions regarding the funding in your NDIS plan. We take pride in providing you with any information in a timely manner that can assist you in maximising the benefits from your funding.
Individuals right to a support person or advocate.	All participants have the right to have a support person to help them with their NDIS Plan. This support person can help a participant with many aspects of their plan. AIIM Choices just needs the support person details and have them sign off on our Advocacy Form where appropriate.
Can I change my Advocate or support person?	Yes, the participant has the right to change their support person or Advocate at any time. AIIM Choices needs to be informed and new arrangements signed off.
Access for interpreter support if required.	At any time, if things are not clear due to language differences, AIIM Choices is happy to provide interpreter support to ensure clear understanding of any information to do with our Plan Management service.
Do I need to email my NDIS Plan to AIIM Choices?	Yes, we need a copy of your NDIS plan so that we can set up the correct information on your service agreement. Using this information, AIIM Choices will then use the NDIS portal to access to your funding to enable your invoices to be paid.
Privacy and confidentiality of information	All information supplied to AIIM Choices is treated as confidential. All information is kept as required by government regulation. For more information please go to www.aiimchoices.com.au
Option to opt out available for NDIS audit purposes.	The NDIS, like many Government bodies, has an ongoing audit processes for its services. You have the right to opt out of an audit process at any time. You will be informed if your file is to be audited, however it's up to you if you are OK with the audit process to proceed.
AIIM Choices feedback – compliments and complaints.	At AIIM Choices we are always happy to receive feedback regarding our services and support. If you have any compliments or complaints please provide feedback either directly via phoning or emailing AIIM Choices. Alternatively you can provide feedback via our website at www.aiimchoices.com.au Also you can provide feedback directly to the NDIS via their website www.ndis.gov.au