

Approval Form - What Can I Buy

This form is to be used by So Joe My Funds My Way participants when seeking approval to purchase items or supports from their *Consumables (Core)* budget between \$100 - \$1,500 per item. For the recurring purchase of items up to the amount of \$299, this form only needs to be completed once.

Participant Details	
Name	NDIS # (if known)
Person requesting purchase:	
Name	
Relationship to person	
Date	
Signature	I declare that the information provided is true and correct to the best of my knowledge.

Suitability Criteria		
It is the participant (or Plan Nominee's) responsibility to determine if the item/support fits within the suitability criteria for this budget – identified below.		
Criteria 1 - general		Response
Reach my goals	Will the support help me to reach the goals of my NDIS plan?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Reasonably priced Good value	Will the support provide me with good value-for-money compared to other options? <i>N.B – A participant can pay the price difference for a higher value product.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Affording the support	Is there enough funding in my Core (Consumables) budget? <i>N.B – A participant can typically move funds between Core budget categories. Please keep in mind that the funds should last the duration of the NDIS plan to enable access to other supports.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Support my connection	Will the support assist me to connect with my community or improve the relationships I have my family and friends?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Best funded through NDIS	Is the support something that should be funded by the NDIS and <u>not</u> other gov. services? <i>N.B support such as dental, health/hospital services, education, housing and public transport are all provided by other government services. Please see 'Understanding Reasonable & Necessary', 'Who funds what' and 'Using My Consumables Budget' So Joe handouts for more detailed information.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Safe and legal	Is the support legal and does not have potential to cause harm or put people at risk?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Not an everyday item/support	Is the support/item <u>not</u> an everyday support? <i>N.B – Everyday items are a participant's responsibility, however, if an Allied Health Specialist has deemed this as reasonable & necessary, please provide their written recommendation.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No

Consumables (Core) funding provides funding for 'low-cost low-risk' supports.

Criteria 2 - Low-cost low risk		Response
Under \$1,500	Is the item or support under \$1,500? <i>N.B – Items above \$1,500 will need to go through the Assistive Technology application process.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Considered low risk?	<p>Is it for low-risk items? <i>The item should fit within AT level 1 or level 2:</i></p> <p>Level 1 – Basic Assistive Technology <i>Does not require an assessment</i></p> <ul style="list-style-type: none"> Safe to use, simple, usually found at supermarket, chemist, hardware <p>Level 2 – Standard Assistive Technology <i>Does not require an assessment</i></p> <ul style="list-style-type: none"> You can often try or test these before purchasing <p>Examples:</p> <ul style="list-style-type: none"> Non-slip bath mats, large print labels, walking stick <p>Examples:</p> <ul style="list-style-type: none"> Shower chairs, handrails, ramps you can move around to places you need them <p>If an item is considered a higher risk, this should be requested as an Assistive Technology request to the NDIS. For more information, I can see the So Joe 'NDIS & Assistive Technology' brochure, phone the NDIS (1800 800 110) or contact my Local Area Coordinator.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No


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So Joe Pty Ltd t/as SO JOE

Preferred method of purchase/payment

METHOD 1



Pay myself

Approx. 3 days to payment

Purchase Criteria

Item Price	\$1 - \$1,500
Evidence	Have a proof of payment - <u>tax receipt</u> .


Participant Checklist

- Complete suitability criteria
- Provide So Joe with tax receipt of payment made & approval form
Email to myteam@sojoe.com.au
- Allied Health Professional report or letter of support for purchases over \$500.
- Pay me details
 - 1. So Joe has my bank details or
 - 2. Bank details for payment

Account Name	
BSB #	
Account #	

N.B. Payments can only be made into a third-party bank account with a participant/Plan Nominee's written permission.

METHOD 2



Get a sales order

Approx. 4 days to payment


Purchase Criteria

Item Price	\$100 - \$1,500
Evidence	Copy of <u>sales order</u> from a store. Includes: <ul style="list-style-type: none"> • NDIS participants name • Item • Amount • Delivery/Pick up • Payment details.

Participant Checklist

- Complete suitability criteria
- Provide So Joe with sales order from a shop
Email to myteam@sojoe.com.au
- Allied Health Professional report or letter of support for purchases over \$500.

METHOD 3



So Joe to purchase

Approx. 6 days to payment

Purchase Criteria

Item Price	\$300 - \$1,500
Evidence	Quote / Screenshot <ul style="list-style-type: none"> • Item • Amount • Delivery/Pick up information • Contact information. <p style="font-size: small; margin-top: 10px;">N.B – The provider must accept credit card payment over the phone.</p>

Participant Checklist

- Complete suitability criteria
- Provide So Joe with information on the item, e.g.
 - Quote
 - Screenshot of item
- Email to myteam@sojoe.com.au
- Allied Health Professional report or letter of support for purchases over \$500.

Item Details

Item Description	Amount	Supplier Information (e.g. website)	Additional Notes, e.g. delivery.

Please note, So Joe will only process this support if it is legal, low-risk to the participant, fits within the suitability criteria and funds are approved by the NDIS.

Next Steps

- All details must be complete to process.
- Email to: myteam@sojoe.com.au
- So Joe will:
 - Confirm the support fits within the NDIS Guidelines (including 'reasonable and necessary')
 - Lodge the request to NDIS for reimbursement
 - Pay or reimburse the support (depending on your selected purchase/payment method)

email
 enquiries. hello@sojoe.com.au
 invoices. payme@sojoe.com.au

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