

CAL POL-011

Service Access & Client Intake

The purpose of this policy is to ensure: -

- Caringa proactively informs people with disability, their family and carers about the broad range of supports and services from Caringa that are available to meet their needs
- Each person who makes an enquiry about a Caringa service is treated fairly, honestly, ethically and without discrimination by Caringa
- Caringa meets and exceeds the NDIS Practice Standards and complies with all relevant legislation

Record of Policy Development

Version	Date Approved	Date for Review
3	25/11/2020	25/11/2021

Responsibilities and Delegations

This policy applies to	All Caringa employees
Specific Responsibilities	BDSO, CSM, COO, TL-WFS
Policy Approval	Board of Directors

Policy Context- This policy relates to:

Standards	The NDIS Rules NDIS Practice Standards
Legislation	<i>National Disability Insurance Scheme Act 2013</i> <i>National Disability Insurance Scheme (Quality Indicators) Guidelines 2018</i>
Contractual Obligations	N/A
Organisation Policies	Caringa Code of Conduct and Ethics Conflict of Interest Policy Customer Service Charter NDIS Conflict of Interest Policy
Forms, record keeping, other documents	Opportunity (MYP) My Support Plan

Policy Details

Caringa strives to achieve fair, honest, ethical and non-discriminatory service access for all clients and prospective clients. Caringa achieves this by:

- Proactively communicating comprehensive information about Caringa services and supports through a diversity of mediums, including as part of Caringa's broader community engagement activities.
- Ensuring that every Caringa employee can direct existing and potential clients to the Business Development Support Officer or to the Client Services Manager who have a clear understanding of the service and supports Caringa offers.
- Ensuring all enquiries by existing and potential clients are forwarded to the Business Development Support Officer (BDSO) who will respond using the existing referral pathways.
- Providing information in languages other than English and in forms of communication other than written information.
- Periodically reviewing the information about service access with existing clients, their family and carers so their feedback can identify and minimise any barriers preventing fair and equal access to the supports Caringa can provide.

- Making all reasonable adjustments to accommodate clients' cultural/language needs and those of their family/significant others/advocates and in particular, respecting the social structure of Aboriginal and Torres Strait Islander communities.
- Advising clients about services within and outside of Caringa that can support them to meet their NDIS goals with choice and control.
- Consulting with existing clients when Caringa reviews its intake and access processes and utilising feedback for continuous improvement including barriers to equal access and advising clients about any resulting changes and improvements.
- Supporting clients' right to complain about any aspect they are not happy with in relation to their access to the supports that are important to them and for them, their family and carers.
- Monitoring the diversity of the people accessing our supports and services to ensure we are reaching the whole community, in particular those groups who are known to experience additional barriers to accessing services and support because of gender, culture, ethnicity and aboriginality.

Procedures

Eligibility criteria

To be eligible for support services from Caringa, the person must have a disability which is:

- Permanent, or likely to be permanent;
- Be at least 7 years of age at time of request for service;
- Have or able to receive funding for their requested service from the NDIS or other funding body / funding method, and/or
- Self-funded.

These criteria will be consistently applied to anyone wishing to access Caringa's services.

The Client Services Manager (CSM) will review the eligibility criteria at least annually, in consultation with the Chief Operating Officer (COO).

Management of requests for a service

Requests for service by clients are ordinarily made by:

- Telephone or email request;
- Face to Face;
- Via Caringa's Website, or Social Media.

Referrals from other agencies are accepted under the following circumstances:

- Directly from the NDIS, via e-mail to Chief Operating Officer (COO) where the agency is able to demonstrate that they have the person's consent to share information;
- Where Caringa has capacity to accept referrals.

Any worker receiving a request or for service will ensure:

The referral or details of the referral including the potential client's (or their representative's) contact details are provided to Caringa's Business Development Support Officer (BDSO). Either via e-mail to enquiry@caringa.com.au or via the webform at www.caringa.com.au ensuring that as much detail as possible about the potential client and their request is captured.

The Business Development Support Officer in consultation with the relevant Caringa service manager will ensure:

- the person has a clear understanding about the services available and the eligibility criteria;
- advocates, support services and interpreters are involved as required;
- the person's needs are assessed (where possible);
- the person is provided with access to the service, if eligible;
- the person is informed of the reason for any ineligibility or refusal of service, advised of their right to appeal and provided with information about alternative options and a referral to an appropriate agency wherever possible. (Note – at present shortages in frontline support workers is the leading cause of Caringa's inability to provide services to a client).
- decisions are consistent and transparent;
- a record is kept of who has requested a service, how they were referred, their eligibility and any onward referrals made, this is recorded in Caringa's CRM.

Intake Process

1. A prospective client, family member, carer or advocate makes a request for service.
2. Eligibility for service is assessed by confirming a number of details with the potential customer, and completing the intake form.
3. Arrangements are made to meet with the client and their informal and/or formal supports either face to face, or electronically.
4. Intake finalisation and standard client risk assessments are applied.
5. The client information will be forwarded to the relevant service manager for further assessment.
6. For Supported Independent Living (SIL) requests or if a client has complex needs, a Client Intake Risk Assessment will be completed.
7. An enquires meeting (comprising the Client Services Manager (CSM), Business Development Officer (BDSO) and Team Leader Scheduling (TL-WFS)) assesses if Caringa can adequately meet the expectations and needs of the individual, and arrangements are assessed to be within Caringa's risk tolerance, the application for service will be progressed.

Approved Services

8. If the assessment or the enquiries meeting (comprising the CSM, BDSO and TL-WFS) indicates that Caringa has capacity to provide services, the request for services will be approved.
9. The Approval is communicated to the client accompanied by a quote for services and Caringa's welcome pack.
10. Caringa's Welcome Pack contains critical policy information and other documents in easy read format. A Meeting will be scheduled prior to services starting to complete service agreement and My Support Plan.
11. At a specified interval after intake, an intake evaluation survey is sent to the client and family/carer/guardian/advocate. Feedback from the evaluation will be considered, and added to Caringa's Continual Improvement System as appropriate.

Waitlist

12. If the assessment or the enquires meeting (comprising the CSM, BDSO and TL-WFS) indicates that the services sought are within Caringa's ability to provide **but not within its current capacity** to provide, the client will be, with their consent, placed on a waitlist until capacity allows Caringa to meet services.

Declined Services

13. If the assessment or the enquires meeting (comprising the CSM, BDSO and TL-WFS) indicates that Caringa is not the best fit for the client or that providing services to the client presents an unacceptable risk to Caringa, the request for service and all documents will be referred to the COO for further assessment.
14. The COO will then make a final determination.
15. If Caringa is unable to provide service, the outcome and the reasons for the decision will be explained to the individual and family/carer/guardian/advocate.

Making referrals

Informal referrals are made by providing the client with contact information about other services or agencies.

Formal referrals are made by other agencies to Caringa or from Caringa to other agencies as directed by the client.

For Support Coordination clients and Plan Management clients, referrals for direct service is made within the context of Caringa's NDIS and Conflict of Interest Policy.

When a referral is made to another agency, the Caringa employee making the referral will ensure that:

- confidentiality and privacy of the client is maintained at all times;
- they have clarified with the client the service needs they have expressed;
- the client is given an accurate picture of the other agency and its service;
- the other agency is given comprehensive referral information with the consent of the client;
- records of contact with the client and the other agency are maintained;
- the cultural and other specific needs of the client are considered e.g. referring Aboriginal and Torres Strait Islander clients to services provided by Aboriginal community organisations.

End of Document
