Monthly Intake Report – Excel spreadsheet

This report is to remain open on your desktop daily, it is a live document that is to be updated each time you receive

- New client
- Pending referral for a service at Headway
- Renewing NDIS plan
- Extension of a current plan
- Exits

Link for file

Client Services (V) > Intake > New & Inactive Participants - Jul_20.xlsx

Completing this is straight forward, tally is added at the 1st day of the next Month.

i.e. March report numbers are tallied 1st April.

Email is then sent to management,attach the spreadsheet too.

Template to remain the same. And emailed to the staff shown in picture below.

Intake - March Report

SM **Stephanie McKay**
To ○ Jenelle Henry; 🟡 Wendy Matthews; 🟡 Debbie van Rossum

📊 New & Inactive Particpants - Jul_20.xlsx
235 KB ⌄

Good Afternoon,

Totals for month, now split to show each service

Total for March

New 1:1	3
New SC	2
New PM	13
Renewal	44
Extensions	35
Total	97

Exited - March

1:1SW	3
SC	2
PM	11
SSG	1
Exited	17

Numbers have definitely increased for this month with renewing clients and extensions.
Obviously a larger number of exits. Details are listed on the spreadsheet and in detail within the journal notes on Brevity.

Kind Regards,