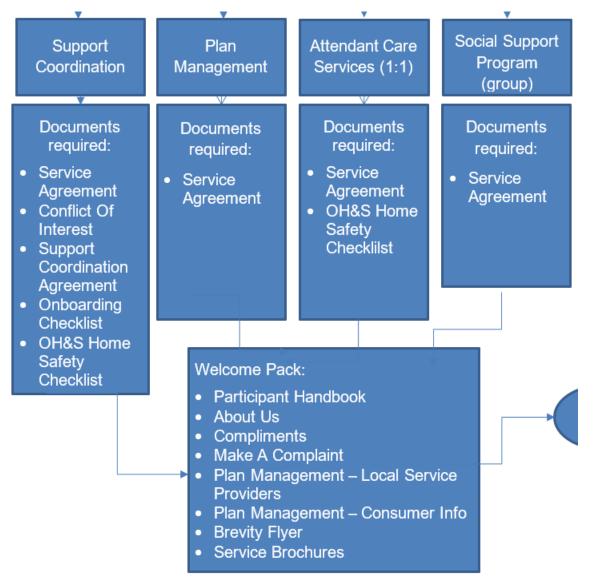


Prepare Documents

Follow the link below to locate the appropriate documents to what service is being provided (see Intake and referral procedure flow chart)



M:\3. QMS\4. Forms\2. PDF Controlled Versions

- Open Service agreement
- Complete all sections accordingly.
- Schedule of Supports on page 10 must include cost per line item and reflect the service being provided – See example below for all services, support coordination, plan management, 1:1 and social support groups.



14_033_0127_8_3 - Plan Management - Set Up Costs	•	232.35	1		232.35
14_034_0127_8_3 - Plan Management - Monthly Fee	•	104.45	12		1253.40
07_002_0106_8_3 - Support Coordination	•	100.14	48		4806.72
04_170_0136_6_1_T Group Activities 1:3 Weekday	•	28.75	176		5060
04_104_0125_6_1_T Access Community Weekday	•	64.04	192		12295.68
04_590_0125_6_1 - Activity Based Transport	•	1	1000		1000
	•				
	•				
	•				
		Service Total: \$24648.15		48 15	

Service rotal. \$ 24648.

When you have completed the agreement, you need to follow the instructions below for posting.

- Print 2 x copies (1 is client copy, 1 is to have sign here sticker and will be headway copy)
- Prepare welcome Kit as above
- Include stamped return envelope A5 yellow with documents and welcome kit.

If participant is a child, please address envelope to parent/nominee

If participant has a nominee, please address envelope to nominee and post to nominee address

If participant lives alone, please address to them.

If participant requested documents be emailed to support coordinator then please use the below template and ensure all documents from welcome kit are attached.



NDIS Plan Management Documentation

Stephanie McKay		S Reply Keply All
SM To O jpfalls36@gmail.com		
Form - Participant - Make A Complaint Form - Easy English - Feb_22.pdf view of KB	SD - Participant - Handbook - Apr_21.pdf 208 KB	SD - Plan Management - Consumer Information - Jul-20.pdf 197 KB
SD - Plan Management - Local Service Providers - Jul_22.pdf v	SD - Participant - Easy English - About Us - Jan_19.pdf 2 MB	UNSIGNED Jessa Falls - Service Agreement _ March23.pdf 337 KB

Good morning Jesse

Thank you for choosing services with Headway for yourself

I have attached a documents including a welcome kit that explains some key policies with Headway. The extra document for signing is a Service Agreement, we require this to be returned when possible.

If you have any troubles with the attached information please let me know and I can arrange to have them posted out for you.

Kind Regards,

Stephanie McKay Client Services Intake Coordinator Monday – Friday 9am – 3pm

Headway Gippsland

- Wording for template (please copy and paste)

Good morning *addressee/nominees/support coord*

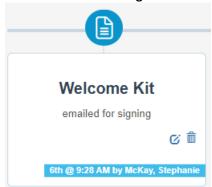
Thank you for choosing/continuing services with Headway for participant name

I have attached a documents including a welcome kit that explains some key policies with Headway.

The extra document for signing is a Service Agreement, we require this to be returned when possible.

If you have any troubles with the attached information please let me know and I can arrange to have them posted out for you.

- Open client tab
- Click Client
- Enter client name
- Double click on client to open file
- Click notes tab
- Include note stating below





Note for Support Coordination documents as below

Preparation of documents

Documents emailed to Megan Support Coordinator to arrange face to face meeting for signing with nominee and participant. Writer will follow up signed documents in 2 weeks if not returned

C 🖻

6th @ 10:44 AM by McKay, Stephanie

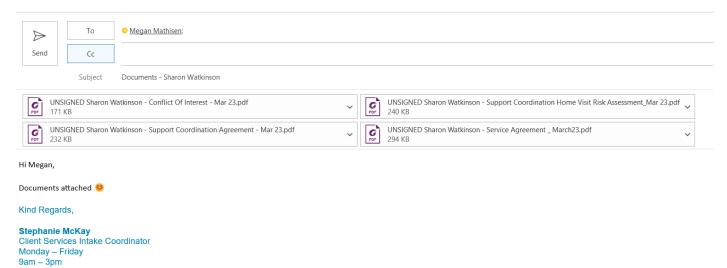
- Unsigned document to be saved as UNSIGNED in the heading in the below link

M:\6. Plan Management Team\Plan Management DOCS - IN PROGRESS\Plan Management DOCS - IN PROGRESS

- Upload the unsigned copy to the Client Checklist under the appropriate document list
- Upload the unsinged copy to Document TAB in the folder Service Agreement Headway.

Support Coordinator documents will need to be emailed directly to the coordinator.

Use template below as your email,



When the signed copies are returned these can then be deleted.