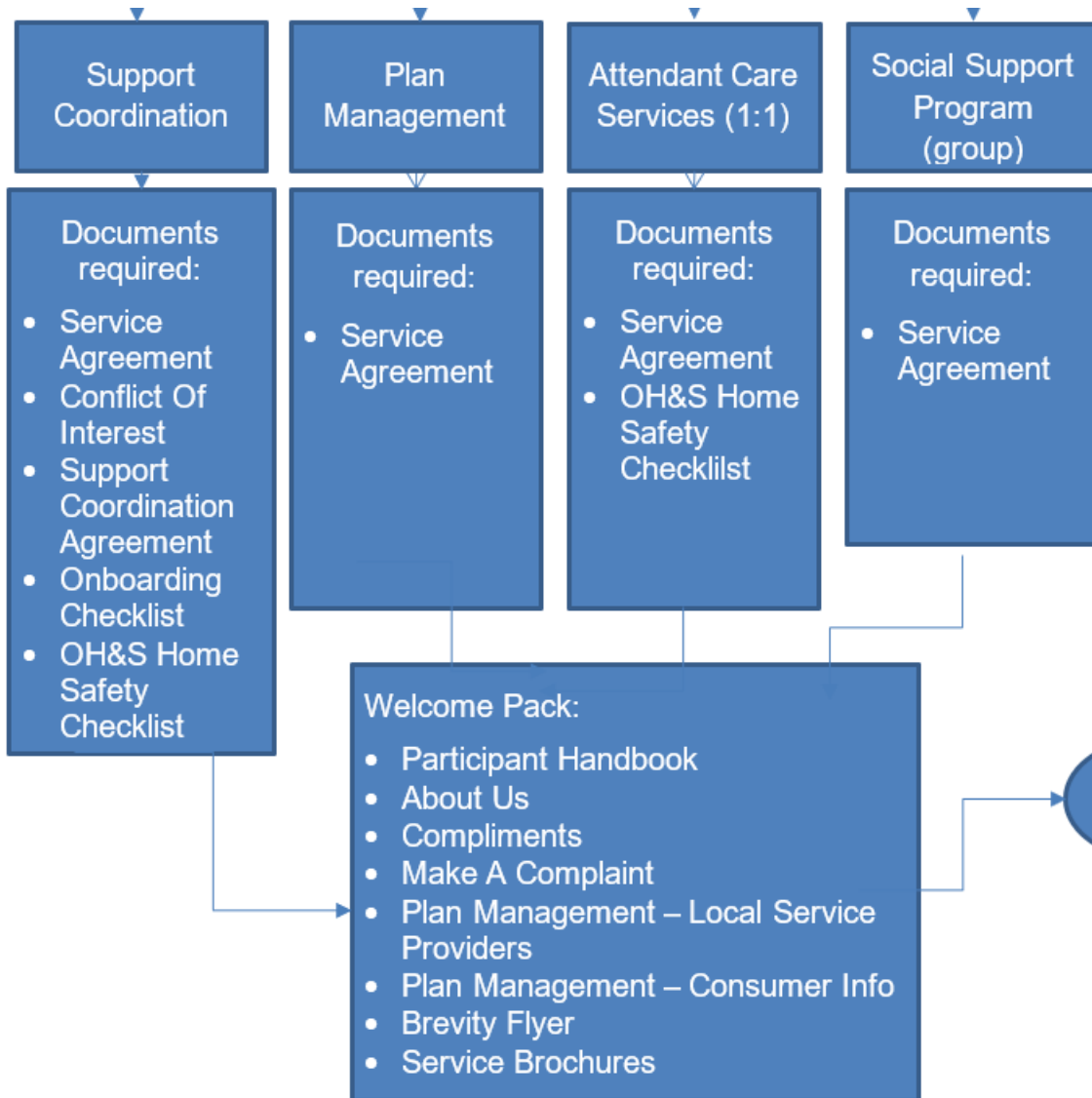


## Prepare Documents

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.



## NDIS Plan Management Documentation


 Stephanie McKay  
 To: [jpfalls36@gmail.com](mailto:jpfalls36@gmail.com)

[Reply](#) [Reply All](#)

 Form - Participant - Make A Complaint Form - Easy English - Feb_22.pdf 731 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 167 KB	 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**

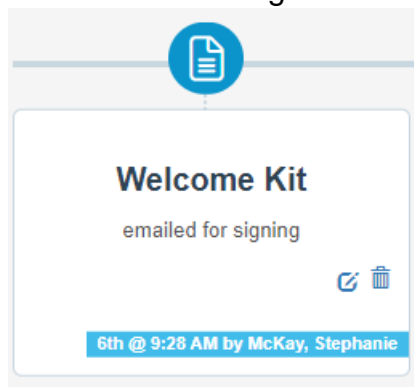
Thank you for choosing/continuing services with Headway for **participant name**

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

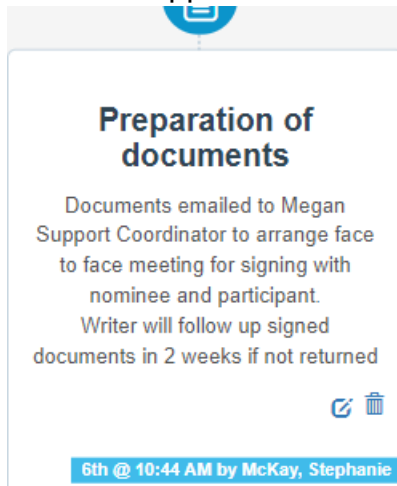
The extra document for signing is a Service Agreement, we require this to be returned when possible.

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



- 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 unsigned 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,

Send	To	Megan Mathisen	
	Cc		
Subject		Documents - Sharon Watkinson	
	UNSIGNED Sharon Watkinson - Conflict Of Interest - Mar 23.pdf		UNSIGNED Sharon Watkinson - Support Coordination Home Visit Risk Assessment_Mar 23.pdf
	171 KB		240 KB
	UNSIGNED Sharon Watkinson - Support Coordination Agreement - Mar 23.pdf		UNSIGNED Sharon Watkinson - Service Agreement _ March23.pdf
	232 KB		294 KB

Hi Megan,

Documents attached 😊

Kind Regards,

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

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