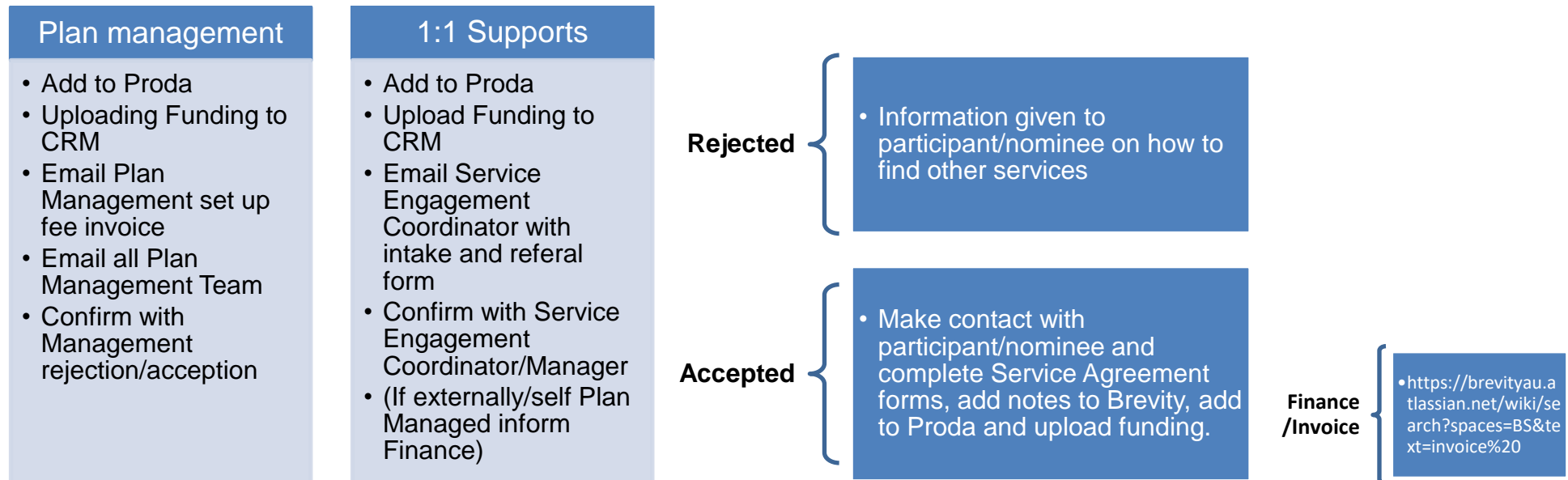# SD - Intake Process – Operations

To be completed by Client Service Coordinator

1. Receive email or phone call from participant/nominee
2. Make contact with participant/nominee within 24 hours or by next working day to discuss what services they require
3. Complete Intake & Referral in Brevity by creating new client, ensuring to gain verbal consent
4. Complete steps below for service that participant wishes to use (for Support Coordination see Intake Process - Support Coordination)

Plan management	1:1 Supports		
• Add to Proda • Uploading Funding to CRM • Email Plan Management set up fee invoice • Email all Plan Management Team • Confirm with Management rejection/acception	• Add to Proda • Upload Funding to CRM • Email Service Engagement Coordinator with intake and referal form • Confirm with Service Engagement Coordinator/Manager • (If externally/self Plan Managed inform Finance)	**Rejected**	• Information given to participant/nominee on how to find other services
		Accepted	• Make contact with participant/nominee and complete Service Agreement forms, add notes to Brevity, add to Proda and upload funding.

Finance /Invoice
• https://brevityau.atlassian.net/wiki/search?spaces=BS&text=invoice%20

5. Return phone call to participant to confirm services that will be provided by Headway Gippsland within 3 working days.

Please note: If participant wishes to use more than one service then steps for each service they require must be taken as above.

SD - Intake Process – Operations

Service Engagement Coordinator
1. Email received from Client Service Coordinator with participant information 2. Contact participant and complete support plan within 24 hours or by next working day 3. Roster first 1:1 support shift for participant and organise OHS Home Safety Checklist to be done on first shift (advising the first 15 mins for OHS Checklist to be completed) with participant within 7 days (or as per participants request) 4. Follow up phone call to Life Skills Officer in regards to shift and OHS Home Safety Checklist within 3 days 5. Welfare check with participant/nominee on services provided within 1 month