

# **SD - Intake Process - Operations**

### To be completed by Client Service Intake 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)

#### 1:1 Supports Plan management Information given to Rejected participant/nominee on how to Add to Proda Add to Proda find other services Uploading Funding to Upload Funding to CRM CRM Email all Plan Email Service Management Team Engagement Coordinator with Make contact with intake and referal participant/nominee and form complete Service Agreement Accepted Confirm with Service https://brevityau.a forms, add notes to CRM, add Finance tlassian.net/wiki/se Engagement to Proda and upload funding. arch?spaces=BS&te /Invoice Coordinator/Manager xt=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.



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## Service Engagement Coordinator

- 1.Email received from Client Service Intake 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