SD - Intake Process – Support Coordination

To be completed by the Client Service Intake Coordinator:

1. **Receive Referrals:**
   - Referrals can be received via email, phone, visit from participants/nominees or the NDIA Portal
   - For new participants, a copy of their NDIS plan is required. If their plan provides less than 3 hours of Support Coordination support, refer them to another organisation
   - If they have 3 hours or more of support, ask the following questions:
     1. Full name
     2. NDIS number
     3. Address
     4. Date of Birth
     5. Disability/s funded for
     6. Hours of Support Coordination funding
     7. Total funding for supports
     8. Remaining budget (if they don't know this, we need to find out who we can get this information from)
     9. What they would like to achieve by having SC support
     10. Enquire for issues such as mental health, involvement with the justice system, homelessness, or drug and alcohol dependencies. (Headway may not be the right fit for these situations)
     11. For returning clients, send their hours to the Support Coordination team to decide if we can take them back
   - Send this information to the Support Coordination Manager to seek approval – if the Support Coordination team can support this client, then complete the full intake within 24 hours. If they are unable to offer support, then refer client to another organisation.
   - Once client has been accepted Client Service Intake Coordinator will add funding to the CRM

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Please note: If a participant wishes to use more than one service then complete the steps for each service they require.

Support Coordination Assistant:

The client Services Intake Coordinator will email that intake has been completed and attach the Service Agreement for the SC Assistant to forward onto the allocated Support Coordinator

1. **Prepare Documents:**
    - Support Coordination Assistant to complete the Support Coordination Agreement, Conflict of Interest form (if needed), and the OH&S home safety checklist (for each new plan)
    - Please save documents as follows (unsigned/signed) Client name – Document name – Month/Year Saved
    - On the CRM the client needs to be linked to all the support coordinators and key Support Coordinator.
    - Upload unsigned documents to CRM (Document section and Client Checklist).
    - Ensure there are welcome packs available at the office
2. **Send Documents:**
    - Email or give these documents to the Support Coordinator within 48 hours or 2 working days.
3. **Follow Up:**
    - Ensure the Support Coordinator completes, signs, and returns the documents within 2 weeks, either in person or via email. (Assist with follow up of these documents if needed)
    - Once signed documents are returned by Support Coordinators to the Support Coordination Assistant, they are to be uploaded to the clients file/ client's checklist on the CRM, as follows (signed) Client name – Document name – Month/Year Saved

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Support Coordinators:

1. **Receive Paperwork:**
    - Receive prepared documents from the Support Coordination Assistant.
2. **Contact Participant:**
    - Reach out to the participant or nominee within 48 hours or 2 working days to arrange a meeting. During this phone call complete as much of the OH&S checklist as possible to determine if the persons home is suitable for first visit. If NOT discuss with Support Coordination Manager to determine alternatives (eg visit at office, joint visit for first meeting etc).
3. **First Meeting:**
    - During the first meeting go through the Welcome Pack including Service Agreement, Support Coordination Agreement, Conflict of Interest if required and ensure participant/nominee understands these before signing. Finalize the OH&S checklist at the same time.
4. **Return Documents:**
    - Return the completed and signed documents to the Support Coordination Assistant within 2 weeks, either via email or in person for uploading to the CRM. Make sure they are saved as the follow format (signed) Client name – Document name – Month/Year Saved

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If a Participant Wants to Leave Support Coordination Services:
The participant or their nominee should tell their Support Coordinator or Client Service Intake Coordinator of their intention to leave and the date.

1. **Exit Process:**
   - The Client Service Intake Coordinator will attempt to complete do an exit interview and inform all relevant staff.
2. **Final Steps:**
   - The client/nominee will need to inform the NDIS of their decision so Headway can be unlinked on the Portal.
   - The Support Coordination team will hand over to the new provider, finalise billing, and inform the Client Service Intake Coordinator and Support Coordination Assistant once this has been completed.
   - The Client Services Intake Coordinator will close the participant's file, unlink the Support Coordinators, remove the Checklist and deactivate the clients file.

If Headway Gippsland wishes to end services:
The Support Coordination team will inform the client/nominee of our decision, assist with finding a new service provider and complete the handover.

1. **Exit Process:**
   - The support Coordination Assistant will inform the NDIS of their decision so Headway can be unlinked on the Portal.
   - The Support Coordinator will inform the Client Services Intake Coordinator once billing is complete
2. **Final Steps:**
   - The Client Services Intake Coordinator will close the participant's file, unlink the Support Coordinators, remove the Checklist and deactivate the clients file

Please note: If intake is closed, Headway won't keep a waitlist. Referrers can check monthly to see if there's availability.