

CLIENT ASSESSMENT, REFERRAL, AND PRIORITISING

PURPOSE:

To give a clear outline of the procedure for assessment, referral and prioritising of clients.

SCOPE:

The process followed for assessment and referral of clients and their needs.

POLICY:

An assessment, referral (where appropriate) and prioritising of clients will occur as soon as possible after receiving a referral.

PROCEDURE:

1. All referrals will be recorded on a referral form and recorded in Care Manager as "Pending".
2. As soon as possible after taking a referral, the Lifestyle Support Supervisor/Client Support Supervisor/ Project Officer will make an appointment to meet the family.
3. At this meeting an assessment of the carer and care recipient's needs will occur using an ONI tool.
4. The assessment will be recorded and taken to the next Case Planning Meeting with the Executive Officer to prioritise the need. If the family meets the criteria for a service, a file will be started.
5. Following the Case Planning Meeting the family will be advised of the out come by letter and will state one of the following reasons:
 - (a) The family will be offered a respite support service or services to suit their needs within the agency's resources. Client Handbook of Breakaway Toowoomba will be provided to the clients.
 - (b) The response time from referral and assessment to commencement is approximately 4 weeks.
 - (c) The family / advocate will be advised that they meet the criteria of our service, but if there are currently no resources available, they will be placed on a 'waiting list' for a service. The family / advocate will be given information about the emergency respite services that are

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available. The family / advocate will be advised about the current waiting list. The waiting list is reviewed at a Case Management Meeting every three months. The Lifestyle Support Supervisor/Client Support Supervisor/ Project Officer will contact them after the Case Management Meeting and inform the family / advocate of the current situation regarding access to the service.

- (d) The family / advocate will be advised that they do not meet the criteria for our service and will be given information about other appropriate services and information about available emergency respite.
- (e) Upon explanation of an overview of Breakaway Toowoomba Inc policies and procedures, the Client / carer / advocate and the Lifestyle Support Supervisor/Client Support Supervisor/Project officer will sign the Client Intake Checklist to be signed off by the Executive Officer to commence support.

5. The Lifestyle Support Supervisor/Client Support Supervisor/Project Officer will inform potential clients / carers / advocates of the availability of and the location of Breakaway Toowoomba policies and procedures and how they are able to access them.

6. **Family will receive an Information Kit.**

An information kit will be available for clients and will include:

- Client Handbook
- Client relevant Policies and Procedures
- Client Intake Checklist
- ONI
- Initial Contact / Referral Form
- Agreement to release info

Relevant Forms

- Initial Contact / Referral Form
- Client Intake Checklist

Approved (Executive Officer) David Bond Date 18.06.09

Approved (Chairperson) Paula Dennis Date 18.06.09