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| **Resource Name** | Emergency Relief Client Intake Policy and Procedure |
| **Related Documents and/or Information** | * Your organisation’s Intake Policy and Procedures (for example, for other services) * Your organisation’s Client Information policies and procedures * Service Eligibility Requirements * Internal and External Referral Policy and Procedure |
| **Version 2.0** | 24 May 2018 |

**About this document**

This document is part of a suite of resources developed by Matrix to assist organisations delivering Emergency Relief services in Australia. We gratefully acknowledge the generous assistance provided by the following organisations, who provided examples of their own documents to inform the development of this set of resources.

**Community Information and Support Victoria - CISVic**

**Lutheran Community Care SA/NT**

**Using this document**

This resource is intended to provide a starting point for the development of appropriate Emergency Relief service forms, policies, procedures, processes and other documents. It is provided as a ‘white label’ template, which means that it may be customised to suit the needs of your organisation. Text in *italics and highlighted in blue* indicates customisation is required. Matrix strongly recommends that the whole document is carefully reviewed to ensure that the details are compliant with your organisation’s funding agreements, contracts, service standards and policies. We have kept formatting to a minimum, as your organisation may require specific formatting to be applied to the final document.

Your organisation’s decision making or delegation policies and procedures should be followed to ensure appropriate approvals are obtained.

It is good practice to review and update any formal documents on a regular basis. We have included a ‘document review’ field in the footer of this document for this purpose.

Please contact Matrix on (freecall) 1800 628 749 or mobct.com.au if you have any questions or problems using this resource.

*Delete this cover page after reading*

# **Emergency Relief Client Intake Policy**

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| --- | --- |
| **Document Status** | *Draft or Final* |
| **Date Approved** |  |
| **Approved By** | *Name and position* |
| **Lead Author** | *Name and position* |
| **Date for Review** | *Date* |

1. **Purpose and Scope**

This purpose of this policy is to guide the client intake process for ***your organisation’s name*** Emergency Relief services, ensuring intake and assessment practice is equitable, consistent and identifies client needs.

This policy applies to all staff involved in client intake for Emergency Relief services. It does not prescribe specific treatment interventions, philosophies or counselling techniques.

This policy is implemented in conjunction with the *insert names of other relevant policies – for example your Privacy Policy, Referral Policy, Client Safety Policy etc.*

1. **Definitions**

Eligibility refers to characteristics that people must possess and/or situations which people must experience in order to receive services from the organisation.

Intake is the initial process through which a person’s needs are identified to determine suitable service delivery and/or referral options. Eligibility for specific services, programs or interventions may be assessed during the intake process.

1. **Principles**

Client intake focuses on engaging with the client, gathering required information from and about the client and determining what services and/or referrals will best suit their needs.

Clients are assessed individually and without judgement.

Only required information is gathered from and about the client that is relevant to our services, programs, interventions and client case management planning.

Clients not accepted into our services or programs, or who require additional intervention, are referred to appropriate third parties for further assessment and care.

1. **Outcomes**

Intake procedures identify initial client needs and eligibility for *(insert organisation name)* Emergency Relief services and programs.

1. **Functions and Delegations**

|  |  |
| --- | --- |
| **Position** | **Delegation/Task** (change as per your organisation’s delegations) |
| Board of Directors | EndorseIntake Policy. |
| Management | EndorseIntake Policy.  Compliance with Intake Policy. |
| Staff | Compliance with Intake Policy. |

**6. Risk Management**

Staff with responsibility for client intake are identified and appropriately trained and/or qualified and engage in ongoing professional development and training.

All staff with responsibility for client intake are introduced to this policy during staff induction/orientation.

*Insert other key risk elements here as appropriate, for example:*

*Intake identifies clients at risk of suicide and/or self harm. Refer to Client Suicide and Self Harm Policy for further detail.*

*Intake identifies mandatory reporting of child abuse and neglect obligations. Refer to Mandatory Reporting Policy for further detail.*

**7. Policy Implementation**

This policy is developed in consultation with staff and is approved by *the Board of Directors.*

This policy is part of staff orientation/induction processes and all staff are responsible for understanding and adhering to it.

This policy is reviewed in line with *(insert organisation name)*’s quality improvement program and/or relevant legislative changes.

**8. Policy Detail**

**8.1 Client Access and Service Delivery**

*(insert organisation name)*’sEmergency Relief services are accessible to all those who seek and need them, and are provided in a manner that is equitable, appropriate and sensitive.

Emergency Relief services are open to people regardless of race, age, language, gender, marital status, country of origin, cultural background, political affiliation, religion, involvement with the criminal justice system, sexual preference or disability, unless specific service eligibility criteria are established.

Where specific service and program criteria have the potential to restrict access to certain people, the eligibility and access criteria is clearly communicated, promoted and complies with anti-discrimination legislation.

*(insert organisation name)* restricts access to *(insert restricted group)* based on (insert reasons for restriction).

Eligibility criteria for Emergency Relief Services are as follows:

* *insert criteria*
* *insert criteria*
* *insert criteria*

**8.2 Client Consent**

Clients must provide consent for the organisation to undertake an intake and assessment process. Consent is given verbally and/or in writing. Where the client comes into contact with the organisation through a third party referral, consent is confirmed directly with the client before commencing an intake and/or assessment process.

*Consent is documented on the client intake forms, the Client Information Consent Form and client file notes.*

**8.3 Client Intake**

Staff undertake intake processes with potential clients to:

* determine eligibility
* identify initial drug and alcohol, health and welfare needs
* provide information regarding specific services and programs
* provide information about the intake and assessment process
* provide information about other requirements for admission to the service/program
* commence developing client rapport.

Persons responsible for conducting client intake processes are *(insert relevant positions).*

*(Insert specific details about how intake occurs e.g. by daily roster, or on certain days, by appointment only, with a single or a number of staff, whether a medical practitioner is on staff or a medical referral is required).*

The client intake is guided by a Client Intake Form which records the following details:

* Client name, date of birth, gender
* *(insert other details from your Client Intake Form)*

If a potential client is eligible for *(insert organisation name)* Emergency Relief services, *(insert actions that happen as soon as eligibility is confirmed, e.g. initial provision of food packages or other material aid, future appointments made for assessment, referrals etc)*

If a potential client is not eligible for*(insert organisation name)* Emergency Relief services and programs or the potential client chooses not to continue with the process, a referral may be made to an appropriate service, as shown below:

|  |  |  |
| --- | --- | --- |
| **Organisation** | **Service/Program** | **Eligibility Criteria** |
| Insert details |  |  |
|  |  |  |

Where clients are in *distress (insert actions to be taken for clients in distress).*

*Potential clients that are assessed as at risk of suicide and/or self harm will be responded to following the Client Suicide and Self Harm Policy.*

**8.4 Priority Access**

Priority access supports access to the service/program for clients who have acute needs. Priority access is clearly communicated**,** promoted and complies with anti-discrimination legislation.

Where demand for services/programs exceeds capacity, priority criteria are applied to the intake and assessment process.

*(insert organisation name)*gives priority access to clients with *(insert priority groups and/or criteria)* due to *(insert reason for priority access).*

**8.5 Waiting lists**

Where demand for services/programs exceeds capacity, the organisation maintains a client waiting list.

*(insert client waiting list management details, including requirements for potential clients to maintain contact, maximum number of potential clients on waiting list, interim support services, referral, etc).*

**8.6 Client assessment**

* **Purpose**

The purpose of conducting a comprehensive client assessment is to identify specific needs – for example, gambling, drug and alcohol, health and family violence - and to obtain a holistic view of their strengths, resources, supports, previous experiences, and expectations from the service/program.

* **Process**

The process for conducting a comprehensive client assessment is *(insert details, e.g. appointment made, timing of the assessment, referral information obtained, client file started, etc).*

Assessment information is also obtained from*(insert details of in-bound external referrals, e.g. Women’s Shelter)* with the consent of the client.

Assessment reviews may be undertaken at various points in the provision of services, including (insert occasion for undertaking another assessment, e.g. after a certain amount of time or amount of service provision).

**Assessment interview**

The assessment interview provides an opportunity to further develop a relationship of trust, empathy and understanding between the client and the worker.

The assessment interview also:

* Assists the client to relate their issues, problems and situation
* Facilitates a review of the client’s past and present and linking these to current issues
* Encourages the client to reflect on their choices, circumstances and consequences

The assessment interview is conducted in a semi structured narrative format, evaluating a number of areas including: *(insert the areas covered in your process, some examples are:*

* *source of referral*
* *presenting issues*
* *drug and alcohol use history and related harms*
* *readiness to change (motivational interview)*
* *risks including suicide and self harm, thoughts of harming others, experiencing harm from others*
* *child protection*
* *previous treatment for drug use, psychological issues or serious illnesses*
* *current situation, including accommodation, work/study, support networks*
* *how clients view themselves and others*
* *strengths and challenges*
* *presentation and mental state*

Mandatory data is also collected at this stage, including:

* *(insert requirements and for who)*

This assessment information is collected using the *(insert organisation name)*Client Intake and Assessment Form.

**Standardised screening and assessment tools.** *(delete if your organisation does not use these)*

*(insert organisation name)*uses the following standardised screening and assessment tools:

* *(insert standardised screening and assessment tools used and the circumstances of use)*

**8.7 Client communication**

All potential clients and clients are informed of the intake process of the organisation. The status of their intake process is clearly communicated.

Potential clients that are not accepted into the service/program at intake are provided with details as to why that decision has been made.

Potential clients and clients have access to information on how to provide feedback and make a complaint. Refer to the *Feedback and Complaint Policy* for further detail.

**8.8 Documentation**

All potential client intake information is recorded and filed *(insert intake documents’ location and process).*

All client information is recorded and filed in individual client files and secured *(insert where client files are kept and access procedure).* Further information is included in the *Client File Management Policy.*

Reports and information prepared for a third party are done with client consent unless it relates to a child protection concern (refer to the *Child Protection Policy* for further information) or concern for the person or another person’s safety.

Third party reports are:

* to include only relevant and important information
* concise, clear, simple and objective
* avoidant of value statements
* exclusive of ambiguous terms, bias and jargon
* inclusive of the source of information noted
* marked ‘strictly confidential’.

**9. References + Resources**

**9.1 Internal**

*Child Protection Policy*

*Client File Management Policy*

*Client Suicide and Self Harm Policy*

*Feedback and Complaints Policy*

**9.2 External**

*(insert details of any external references or resources, for example ‘The Emergency Relief Handbook, ACOSS, 2011)*

**9.3 Quality and Accreditation Standards**

*(insert details of relevant quality and/or accreditation standards that relate to this Policy)*