



JUMBUNNA COMMUNITY PRESCHOOL AND EARLY INTERVENTION CENTRE INC.

St 5a	INTAKE AND REFERRAL
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Applies to:	Version:
Specific responsibility:	Date approved: 5 Aug 2014

Policy context: This policy relates to	
Standards or other external requirements	NDIS Practice Standards
Legislation or other requirements	Disability Services Act
Contractual obligations	National Disability Insurance Agency

POLICY STATEMENT

Jumbunna is committed to ensuring that everyone who approaches the organisation for service is assisted either with access to the service or with an alternative strategy that addresses their needs. Intake or eligibility criteria will be inclusive of the widest possible group of people who may need to access the service and will comply with NSW and Commonwealth Anti-Discrimination legislation requirements.

Jumbunna will:

- operate with clear criteria for eligibility and priority for service access
- apply these criteria in a fair, equitable, ethical and transparent manner
- provide information and referrals for clients who are ineligible for the service, unable to access the service for other reasons or who require the service of other agencies.

Intake and referral will operate within the service guidelines for the various funding bodies at all times.

PROCEDURES

Eligibility Criteria

Eligibility for assistance: Will be assessed on individual funded program criteria

These criteria will be consistently applied to anyone wishing to access the service.

The General Manager will review the eligibility criteria as needed.

Management of Requests for a Service

Requests for service by clients are made by phone, in person, written, and/or with a support person.

Referrals from other agencies are accepted as long as they meet the intake criteria.

General Manager receiving a request or application for service will ensure:

- the person has a clear understanding about the services available and the eligibility criteria
- advocates, support services and interpreters are involved as required
- the person's needs are assessed
- if eligible, the person is provided with access to the service. If the organisation is unable to provide the service due to limited-service levels the person can be placed on the waiting list, provided with alternative service options or referred to an appropriate service.
- if ineligible or excluded from the service, the person is informed of the reason for refusal of service, advised of their right to appeal and provided with information about alternative options and a referral to an appropriate agency wherever possible
- decisions are consistent and transparent
- a record is kept of who has requested a service, how they were referred, their eligibility and any onward referrals made.

Making Referrals

- Informal referrals are made by providing the client with contact information about other services or agencies.
- Formal referrals are made to other agencies with the clients' permission.

When a referral is made to another agency, the staff member making the referral will ensure that:

- confidentiality and privacy of the client is maintained at all times
- they have clarified with the client the service needs they have expressed
- the client is given an accurate picture of the other agency and its service
- the other agency is given full and honest referral information
- records of contact with the client and the other agency are kept

DOCUMENTATION

Documents related to this policy	
Related policies	
Forms, record keeping or other organisational documents	

Policy Name:	Intake & Referral	Policy Number:	
Date Approved:	24 August 2023	Approved By:	Board of Management
Date Issued:	31 August 2023	Review Date:	30 June 2025
Version 1.5	This version of the policy was approved 24 August 2023 and replaces the version approved 28 July 2022.		