



Intake and Transition Policy and Procedures

"I have a right to have my needs understood to be provided safe and appropriate supports that are in line with my personal preferences" – client voice.

Introduction

Play Grow Flourish is committed to providing people with a high standard of service aimed at meeting individual needs and promoting dignity, purpose, and security. Play Grow Flourish provide a consistent and transparent approach to all people entering or exiting the service.

Principles

The United Nations Convention on the Rights of Persons with Disabilities and the National Disability Insurance Scheme quality standards promote access, inclusion, and choice for people with disability with a focus on their individual needs, goals, and aspirations. Play Grow Flourish aims to promote these principles within all aspects of intake and transition process.

Policy

Play Grow Flourish acknowledges all people have the right to accurate, clear, and transparent information when enquiring, or accessing or transitioning from the service. This information is provided to inform their decision making.

The intake process is undertaken to identify the individuals needs and preferences. This information is utilised to identify the plans required and to identify and manage risks associated with their supports and daily living.

Transition planning supports clients who are accessing or leaving the service to do so, in a planned, communicated and risk managed way to minimise any negative impacts that may arise during the process.

Play Grow Flourish acknowledges that each person has the right to refuse a service or leave Play Grow Flourish at any time they choose. Furthermore, it is acknowledged that Play Grow Flourish may discontinue a service in consultation with the person, their family and other important members of the person's support network if the service is no longer sustainable or appropriate to the client.

Play Grow Flourish is committed to working with and referring to other community services or organisations to meet the multiple needs of clients.

Exit procedures will be fair, transparent, follow due process and uphold the rights of clients.



Procedure

Pre-entry

Entry criteria

- Current NDIS Plan
- Require the services that are provided under Play Grow Flourish service provision
- Are geographically placed to receive services (or have the appropriate technology).

Waiting List

Where enquiries are made to the service, an informal suitability assessment will be undertaken to discuss the client's needs, wants and preferences to deem if the service has the appropriate resources to effectively support the person. This includes assessing the existing capacity of the service.

Where the applicant is deemed suitable and there is not capacity, the client will be invited to be placed on a waiting list. When capacity becomes available or an appropriate staff member can be sourced, Play Grow Flourish will contact clients who have identified as having no informal or formal support first and arrange a time for an intake process.

Initial Meeting

On entry to the service, an initial meeting will be arranged with the client, their family/carers, and other significant people from their support network. This may take place at the person's home, or other suitable community venue. The initial meeting provides an opportunity to further discuss the client needs and to review any documentation available, including a transition form from a previous provider, if available.

Where a person provides their NDIS Plan, Play Grow Flourish will determine if the organisation is able to deliver the specific supports detailed. If the NDIS Plan has not been provided, Play Grow Flourish will request the client's NDIS Client Number (for Agency Managed clients). Play Grow Flourish acknowledges that clients do not have to provide their NDIS Plan if they do not wish to.

Welcome Pack

The client will receive a Welcome Pack explaining their rights while receiving supports from Play Grow Flourish. This information is discussed in a format that best meets the client's communication needs.

The Service Agreement

Service agreements are developed in collaboration with the client where all components of the agreement are discussed.

This includes what services will be provided and how often. All costs associated with the delivery of service are clearly detailed outlining the amount per hour and total budgeted cost for the period.



The service agreement is signed by both parties, and the client is provided a copy of the agreement. In the instance where the client is unable to sign, and a representative is not present, a note will be made outlining the circumstances under why this occurred.

Intake and Assessment Form (About Me and My Supports)

All clients who enter the service will, in collaboration with Play Grow Flourish, complete an About Me and My Supports Form. The information informs and determines the goal planning activities and service provision and ensures that the client is receiving supports in line with their needs and preferences.

Personal preferences

The about me and my support form identifies the individuals' personal needs and preferences to ensure a person-centred approach is provided in the delivery of services. This information includes the clients:

- Personal details
- Support Network
- Cultural Background
- Daily Activity
- Likes/dislikes.
- Preferred staff member characteristics (male/female, age, specific interests)
- Communication needs

Specialised Plans required

The About Me and My Supports form identifies which plans will be required in order to effectively support the client. These plans ensure comprehensive supports are provided.

Where identified, this will include:

- Goal planning, including health needs and risk assessment (mandatory)
- Communication Plan (dependent of client requirements)
- Medication Plan (dependent on client requirements)
- Medical Management Plan (dependent on client requirements)
- Mealtime Management Plan (dependent on client requirements)
- Specialised module plans
- Emergency Management Plan
- Behaviour Support Plans (dependent on client requirements)

Vulnerability Assessment (My Safety Assessment)

An important feature of the intake process is for a vulnerability assessment to be undertaken. The outcome of this assessment is recorded within the Master Register and determines the



frequency of management oversight required in the provision of supports to ensure client safety and quality of care.

This process is informed by the Prevention of Violence, Abuse, Neglect, Exploitation and Discrimination, as well as Emergency Management Planning (*See also Prevention of Violence, Abuse, Neglect, Exploitation and Discrimination Policy and Procedure and Emergency Management Policy and Procedure*)

Environmental Safety Checklist

Where supports are provided in the client's home, an environmental safety checklist will be undertaken in consultation with the client. The checklist allows Play Grow Flourish to identify any risks to the client or staff in the provision of supports. Where there are identified risks, risk management strategies will be developed and the appropriate alerting mechanism will be implemented for staff (*See also Work, Health and Safety Policy and Procedure*).

Exiting the Service

A person may leave Play Grow Flourish for a number of reasons or circumstances including:

- They no longer wish to access the services provided by Play Grow Flourish
- A person has met all of the planned goals.
- Relocation to an area outside Play Grow Flourish's area of service delivery
- Where the service is no longer able to meet the person's needs or assist in achieving chosen goals
- The person is unwilling to meet the reasonable conditions required in their service agreement and thus affecting the safe delivery of a service to the client and the health and safety of staff.
- Changes in the person's condition results in the support they require exceeds the skills and expertise Play Grow Flourish can deliver.
- There has been no contact between the person and Play Grow Flourish for a period of three (3) months.

Service Transition

Transition

Where a person is transitioning or transferring from another service provider, Play Grow Flourish will seek permission from the person and/or their family/carer to contact their ingoing/outgoing provider to obtain information about support requirements to assist support delivery during the transition.

This process includes the development of a documented plan to support the transition across services.

The process includes undertaking a documented risk assessment and management plan to minimise any negative impact arising from the change.



Temporary transitions

Where a client undertakes a temporary transition, including to a health care setting or hospitalisation, Play Grow Flourish ensures transition planning occurs to support the client with the process. This includes undertaking a comprehensive risk assessment that is reviewed and communicated throughout the temporary period, to ensure strategies that are developed minimise any negative impacts arising from the arrangement.

Where it is not the person's choice to exit the service

Information regarding the reasons for being asked to leave the service will be provided and explained to the client. These reasons will be included in the transition plan if required. The service transition will only be actioned after discussion and consultation with the client, their family/carer and other important stakeholders, and strategies have been implemented to meet irreconcilable differences.

Exit interview

As part of the transition strategy the client and their family or carer will be offered the opportunity to participate in an exit interview. Communication methods appropriate for the client and supporters will be used to assist this process as required. This information will inform the continuous improvement and feedback processes to refine services and identify any training requirements for the service.

Training

All Play Grow Flourish staff receive training in relation to intake and transition procedures at induction and through ongoing practice review.

Responsibilities

For the purpose of this policy, the Management Team includes the Director, Executive Team Leader and Human Resources Manager.

Management is responsible for:

- Reviewing and approving any changes to the policy and procedure
- Conducting internal audits to ensure intake and transition process are operating effectively.
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- Supporting consistent implementation of intake and transition processes across all service areas.
- Assisting with review of complex transitions or where elevated risks are identified.



- Acting on behalf of the Director when required in oversight of audits or client planning.
- Supporting staff training and onboarding relating to intake and transition procedures.
- Ensuring documentation standards and audit readiness under the NDIS Practice Standards.
- Managing version control and continuous improvement tracking of intake-related documents.

Shift Managers are responsible for:

- Ensuring staff are familiar with the requirements of the policy, and have sufficient skills, knowledge, and ability to meet the requirement.
- Ensuring the policy is effectively and consistently implemented across the service.
- Monitoring client intake and assessment forms, service agreements and transition documents for compliance with the stated policies and procedures.
- Ensuring staff understand and follow intake and transition procedures.
- Coordinating initial meetings and ensuring all required documentation is completed and uploaded.
- Monitoring service agreements, About Me forms, and transition documentation for compliance.
- Following up on client exit processes and ensuring all records are finalised and filed appropriately.



Staff are responsible for:

- Following and complying with the requirements of this policy and associated procedures.
- Completing all intake and transition documentation accurately and in a timely manner if applicable to the staff.

Related Policies and Documents

- Welcome Pack
- Service Agreement
- Privacy and Confidentiality Policy and Procedure
- Consent Form
- Code of Conduct
- Individual Planning Policy and Procedure
- Freedom from Violence, Abuse, Neglect, Exploitation and Discrimination Policy and Procedure
- Emergency Management Policy and Procedure
- Work Health and Safety Policy and Procedure
- Complaints and Feedback Policy and Procedure
- Transition Form
- About Me and My Supports

Review

Play Grow Flourish will review each policy through internal audit processes, client feedback or as contextual drivers determine the need for a review.

Release Date:	Version No:	Approved By:	Amendments:
January 2024	1.0	Director	Nil
Review Date:	Version No:	Approval By:	Amendments:
May 2025	2.0	Human Resources Manager	Added responsibilities for Management and Shift Managers. Enhancing intake documentation, and communication accessibility references