



CASS Group- Disability Services

INTAKE AND REFERRAL

Policy Code: 1110	INTAKE AND REFERRAL
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Policy Statement

CASS Disability Services are 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 NDIS Practice Standards and Commonwealth Anti-Discrimination legislation requirements.

The organisation 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 Participants 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 all CASS Disability Services at all times.

Procedures

Eligibility criteria

To be eligible for assistance:

- People with disability
- Be assessed and approved by National Disability Insurance Agency (NDIA).

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

Management of requests for a service

Requests for service by Participants are made all means, including email, phone contact, drop in etc.

Referrals from other agencies are also accepted under the following circumstances:

Coordinator 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



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- The person's needs are assessed
- If eligible, the person is provided with access to the 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

Coordinator will be responsible for maintaining an accurate and current contact and referral database. The data base will be stored in hard copied or in computer.

Informal referrals are made by providing the Participant with contact information about other services or agencies.

Formal referrals are made to other agencies.

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

- Confidentiality and privacy of the Participant is maintained at all times
- They have clarified with the Participant the service needs they have expressed
- The Participant is given an accurate picture of the other agency and its service
- The other agency is given full and honest referral information
- Information about the Participant's needs are put in writing to the Participant or other agency when appropriate
- Records of contact with the Participant and the other agency are kept
- the culturally specific needs of the client are considered e.g. referring Aboriginal and Torres Strait Islander clients to services provided by Aboriginal community organisations

Documents related to this policy	
Related Policies	Access to supports Need Assessment
Forms, record keeping or other organisational documents	<ul style="list-style-type: none">• Case handling procedure



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Reviewing and approving this policy		
Frequency	Person responsible	Approval
3 years	Unit Head	HAS & DS Committee

Policy review and version tracking			
Review	Date Approved	Approved by	Next Review due
Version 1	1 June 2014	HAS & DS Committee	31 May 2017
Version 2	29 May 2017	HAS & DS Committee	28 May 2020
Version 3	November 2020	HAS & DS Committee	November 2023