



Client Access and Eligibility Policy

Approved by the St Vincent de Paul Society NSW on 10 October, 2014

Version Control

Contact names	Role / position	Version number	Date	Review date
Joanna Fanos	Policy Coordinator	1	10/10/2014	10/10/2015
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Policy Statement

The Society provides all people with a consistent process when they request a service. Services are allocated in an equitable and individualised manner.

The Society aims to meet the identified needs of each person who requests a service. Where the Society is unable to provide services, the Society will assist people to access other appropriate services.

Scope

This Client Access and Eligibility Policy applies to all NSW Support Services staff, volunteers and members. It also applies to Central Councils implementing the Client-Centred Service Delivery Model.

Purpose

This policy guides the Society's client access and intake process in order to maintain an equitable and transparent approach to service admission for all clients.

Definitions

Concept	Meaning
Access	The entry points through which people can request Society services and access intake.
Intake	The initial process through which a person's needs and circumstances are identified in order to determine suitable service options. A person's eligibility for Society services is assessed during the intake process.
Eligibility	The characteristics that people must possess, or situations which people must experience, in order to receive a Society service.
Service	Services assist clients to meet their needs and improve their situation. Services are provided at Society venues and in other locations. Society services include programs which provide support to individuals and communities.

Policy Framework

Access

Who Can Request Society Services?

In addition to potential clients, Society services may be requested on their behalf by:

- Carers and guardians;
- Family members and friends;
- Advocates;
- Other service organisations;
- Government agencies; and
- Society members, volunteers and staff.

Where a request for service is received on a person's behalf, the Society will verify with the person that they agree to the request.

How Are Society Services Requested?

Society services are requested by:

- Phone;
- Fax;
- Email; and
- Presenting to the Society in person.

Eligibility

Service Admission Requirements

Eligibility requirements must be met in order for a service to be provided.

Eligibility requirements reflect:

- Society values and objectives;
- contracts between the Society and government funding bodies;
- community and client needs;
- spaces available in a service;
- matching clients to appropriate services.

Individual Society services that cater to specific client groups may have specific eligibility criteria. All eligibility requirements comply with anti-discrimination legislation.

Society staff, members and volunteers should consult their line manager where eligibility requirements are unclear.

Priority Service Admission

The Society aims to give all people eligible for its services timely access to services. Where this is not possible, the Society prioritises access for people based on identified need.

Where appropriate, some Society services are able to maintain waiting lists where the number of clients awaiting entry exceeds capacity. In these services, waiting lists are regularly reviewed and updated and are consulted when spaces become available.

Ineligibility

Where people are unable to be provided with a Society service, all efforts are made to offer a referral to an alternative that can meet their identified needs.

The person or their guardian must provide written or verbal consent before the referral is performed. A young person is able to give their own informed consent to a referral if they demonstrate full understanding of what is proposed; the age at which this is evident will vary from person to person.

Professional judgement should be used to determine if the young person can give informed consent. Consent must be documented to ensure transparency.

Please see the [Client Referral Policy](#) and [Trauma Informed Care Policy](#) for further information regarding referrals.

The Process of Determining Eligibility

Intake Assessment

Accurate information is required in order to determine eligibility for service.

An intake assessment tool is used to gather the information required to determine whether the Society is an appropriate service provider. This process must be explained before an intake assessment is performed.

Intake assessments:

- require consent in order to be performed;
- are performed by Society staff, members or volunteers with client intake responsibilities as soon as possible after a request for service is received;
- occur by phone or in person;
- include other people where requested; and
- identify any adjustments required to enable services to be delivered, such as mobility support or interpreters.

Only information that is relevant and supports service entry is gathered during an intake assessment. The role of supporting information must be explained before an intake assessment is performed.

Supporting information may include personal information and material such as:

- identification (date of birth, known address if available, age, phone number, email address);
- income statements, letters or bills;
- third party reports or advice;
- other evidence as applicable.

No information is collected from third parties without prior consent of the person requesting service.

Storage of Information

Information gathered through the intake process must be stored and protected in the service's current information management system. Once the Society Client Information System (SCIS) is operational all information will be securely held there. All information collected should be stored regardless of whether a person is deemed eligible or ineligible for Society services.

Whenever client information is stored:

- a unique file is created;
- access to the information is restricted to the person that the information concerns or their guardian, Society staff, members or volunteers of the relevant service.

Confidentiality

Information obtained through the intake process must remain confidential. Exceptions are where a client or their guardian has consented to release this information and/ or disclosure is required under law such as by subpoena, to uphold the Society's duty of care or to meet mandatory reporting requirements.

Please see the [Privacy Policy](#) for further information about confidentiality.

Please see the [Child Protection Policy](#) for further information about mandatory reporting or the [Critical Incident Policy and Procedure](#) for further information on responding to critical incidents.

Related Policies and Legislation

State Support Office Policies

- [Child Protection Policy](#)
- [Code of Conduct for Members, Volunteers and Employees](#)
- [Complaint Handling Policy and Procedure](#)
- [Conflict of Interest Policy](#)
- [Managing Fraud and Dishonest Behaviour Policy and Procedures](#)
- [Privacy Policy](#)
- [Records Retention Policy](#)
- [The Ethos](#)
- [Work Health and Safety Policy Statement](#)

Support Services Policies

- [Client Access and Eligibility Policy](#)
- [Client Assessment and Planning Policy](#)
- [Client-Centred Service Delivery Policy](#)
- [Client Charter Policy](#)
- [Client Referral Policy](#)
- [Client Incident Management Policy and Procedure](#)
- [Cultural Safety and Diversity Policy](#)
- [Partnerships Strategy Policy](#)
- [Privacy Policy \(in draft\)](#)
- [Quality Management Policy](#)
- [Reportable Incident in Disability Supported Group Accommodation Policy](#)
- [Trauma Informed Care Policy](#)

Legislation relating to this policy includes:

- Children (Care and Protection) Act (1987)
- Children and Young Persons (Care and Protection) Act (1998)
- Commission for Children and Young People Act (1998)
- Community Welfare Act (1987)
- Crimes (Domestic and Personal Violence) Act (2007)
- Disability Discrimination Act (1992)
- Health Records and Information Privacy Act (2002)
- NSW Anti-Discrimination Act (1977)
- Privacy Act (1988)
- Racial Discrimination Act (1975)
- Sex Discrimination Act (1984)
- Supported Accommodation Assistance Act (1994)
- Work, Health and Safety Act (2011).

Roles and Responsibilities

These policy requirements will be followed by all people included within the scope of this policy.

Effectiveness and Review

This policy is scheduled for review yearly from its date of endorsement and every two years thereafter, or more frequently as needed to align with legislative or practice changes.

Further Advice or Assistance

Please speak with your Manager if you have any questions regarding this policy. You may also contact the Support Services Policy Coordinator to provide feedback on this policy.

Approval and Amendment History	Details
Original Approval Authority	SVdP Society CEO 10/10/2014
V2	Minor changes to make language more person-centred. Consent provided by young people is to be on an individual basis dependent on understanding.