

## Customer Planning Policy and Procedure

### 1.0 Purpose

The purpose of this policy is to ensure that every participant has access to responsive, timely, competent and appropriate supports that meet their needs, desired outcomes and goals.

MATCHU PTY LTD will provide program design, individual planning, coordination and support management to all participants.

### 2.0 Scope

MATCHU PTY LTD will ensure Staff are trained appropriately and act professionally when developing plans that empower the participant to achieve their needs, goals and aspirations.

We will keep each participant informed of their plan while undertaking a holistic approach that incorporates strength-based and person-centred strategies.

### 3.0 Policy

All services and support plans are developed and delivered in collaboration with the participant and their advocate. All participants, family members, representatives or advocates must be included in any decision-making process, selection of strategies or activities, and approval of all aspects of their support plan. Support management will consist of delivery, monitoring, review and reassessment, in a timely manner.

Director, or their delegate will ensure that the least intrusive options are planned, using contemporary evidence-informed practices.

Reasonable efforts will be made to match the participant's key worker requirements to our current frontline workers.

We will collaborate with all relevant parties, including other service providers, and only share information with the consent of the participant. Our team will consult to ensure that we meet individual needs.

Director will ensure that only appropriately trained Staff will work with the participant. The process of allocation will incorporate a skill and knowledge review of a potential frontline worker.

MATCHU PTY LTD will utilise this policy to ensure the organisation maintains a contemporary approach to support management services.

### 4.0 Procedure

#### 4.1 Support management principles

Support management includes screening, comprehensive assessment, support planning and support plan implementation, monitoring, review and case closure.

It is recognised that we provide positive behaviour support (PBS) as our majority of service. The production of a behaviour support plan (BSP) is one of the key requirements of PBS. Some parts of support planning will use the BSP to outline recommendations and strategies for management.

Director, or their delegate, will:

- Match available resources, i.e. Staff to the needs of the participant
- Work across service boundaries to ensure that participants with complex care needs are provided access to a full range of required support services such as allied health, health and social support services

- Provide a single point of contact for participants that require a complex range of services and/or require intensive levels of support
- Verify that consent was received for assessment and services and is recorded in the participant's file
- Review the participant's referral information and confirm eligibility and suitability for our service
- Contact the participant and arrange a suitable time for a comprehensive assessment
- Arrange interpreters, advocates, guardians, or other service providers, with the participant's consent, to attend the assessment
- Determine, if possible, whether a clinical assessment of the participant's health condition is required and arrange for the appropriate Staff to attend the assessment, i.e. Rn or allied health professional
- Ensure representatives identified by the participant, such as family, advocate and carers, are contacted and, if necessary, participate in the assessment.
- Carry out the assessment as per the organisation's appropriate policies and procedures and base the assessment on the participant's needs and situation.
- Contact the referrer and any existing providers, within five (5) days after a comprehensive assessment, for further information that may be required
- Investigate potential options for sourcing support, including the availability of our Staff/resources and the use of brokerage resources
- Arrange, if necessary, a case conference with relevant services and individuals to discuss the participant's situation
- Ensure NDIS related goals and any risks are documented within the support plan
- Inform the participant that their coordinator will continually review and assess their services for effectiveness
- Provide the support plan, where appropriate, to a representative, with the participant's consent
- Develop a support plan that includes a plan of action that meets the participant's needs, requirements and aspirations. The support plan will include:
  - Participant information, e.g. Personal and health details, cultural and spiritual requirements, sexual identification, aboriginal and torres strait islander
  - Participant goals (NDIS)
  - Advocate details if applicable
  - Strategies to develop, sustain and strengthen independent life skills
  - Risks to participant and Staff, include management of the risk if required (in a separate risk management plan)
  - Monitor the relevancy of the support plan through regular contact with the participant and other representatives and service providers involved in the wellbeing of the participant.

Support plan reviews may be held to:

- Determine if the current roles and responsibilities of Staff and organisations are meeting the needs of the individual
- Assess if the frontline workers are meeting participant's goals
- Review the purpose, intent, and direction of the intervention
- Evaluate the service currently being supplied against the participant's strengths, needs, goals and aspirations
- Consider previous assessments and to determine if any more are required
- Reassess the participant, using the relevant assessment tool
- Reevaluate using evidence gathered during work with the participant
- Examine the status of the support plan
- Make decisions relevant to the participant; ensure all parties are informed
- Review goals and actions
- Schedule a case conference with a participant and relevant stakeholders, to ensure their active involvement and to discuss any changes in service
- Plan towards transfer or closure, if relevant
- Record any changes to a support plan in the participant's notes or file
- Assess the need to change the service agreement.
- Risk assessments will be undertaken with clients, and documented. Appropriate strategies will be planned and

implemented to treat known risks. This will include an assessment of the extent to which the client relies on our services for daily living needs and the potential impact on the client's health and safety if services were disrupted.

- We will develop a support plan that:
  - Is provided to the client in the language, mode of communication and terms they are most likely to understand (e.g. Easy English, pictorial format, translated document, verbally explained with the use of an advocate or interpreter)
  - Is easily accessible and understood by the client and their workers
  - Where appropriate and with the client's consent, shared with their support network, other providers and relevant government agencies
- The following will be included in our client management system, as an appendix to our Service Agreement or referenced in a Behaviour Support Plan.
  - Includes arrangements, where required, for proactive support for preventative health measures, including support to access recommended vaccinations, dental check-ups, comprehensive health assessments and allied health services
  - Addresses potential emergency and disaster scenarios and includes actions to ensure their safety, health and wellbeing in the case of an emergency or disaster. Response plans will include:
    - preparing for and responding to crisis scenarios,
    - changes to supports and other adaptations as necessary,
    - how changes will be communicated to all relevant stakeholders,
    - how the plan will be reviewed.

## 4.2 Exiting the service

When the participant's needs begin to exceed program resources, or should the participant change to another service provider, the Director or Operations Manager will:

- Refer to the transition and exit notes in the Participant Support Plan
- Follow the guidance of MATCHU PTY LTD 'Transition or Exit Policy and Procedure'
- Inform the participant of any potential risk of transferring or exiting
- Negotiate participant handover arrangements with the new service provider
- Advise participant of risk related to leaving the service.

## 5.0 Related documents

- Access to Supports Policy and Procedure
- Consent Policy and Procedure
- MATCHU PTY LTD assessments (as required)
- Service Agreement
- Support Plan
- Transition or Exit Policy and Procedure
- Behaviour Support Plan

## 6.0 References

- NDIS Practice Standards and Quality Indicators 2020
- Work Health and Safety Act (2011)