

Client Intake Checklist

Assessment Officer _____

I have explained the following information to: _____

Signed by assessment officer: _____ Date: _____

Topic	Tick
• Eligibility criteria for entry to the service, and procedures for prioritising access	
• Individual's right to access a support person of their choice to assist them when entering or exiting a service, and in developing their personalised plan	
• Information and support which can be offered to assist individuals using the service	
• How the service works with individuals accessing services to develop a personalised plan to assist them to achieve their goals, and the format of the copy of the plan which will be provided to the individual accessing the service	
• Procedures for accessing or nominating a support person of their choice	
• Support which will be provided, how the support will be delivered, and how frequently the personalised plan will be reviewed	
• Privacy and confidentiality policy and procedures in relation to the use of, and access to personal information held about individual accessing services	
• Procedures for release of personal information to another party and the requirement for informed consent for release	
• How the individual accessing services can participate in decision making processes to assist the service to improve	

The above information has been explained to me.

Signed by individual: _____ Date: _____

Signed by nominated support person: _____ Date: _____