

CVS POLICY & PROCEDURE MANUAL

Policy Area: **Operational Policies - Service Delivery**

Policy # & Name: **5.18.A Orientation, Intake and Acceptance**

Group: Residential, Day, Community Living Support Services

Purposes:

To ensure that potential consumers and their families have accurate information on which to make application decisions, and fair and equal access to CVS services; to ensure that CVS has sufficient information upon which to base acceptance decisions; and to ensure that both CVS and the consumer have sufficient and appropriate information upon which to base decisions about whether the services requested will meet the consumer's needs.

Policy Statement:

CVS provides information and orientation sessions for consumers requesting services.

CVS collects information from applicants in order to make acceptance decisions. Acceptance decisions are based on eligibility and MCFD referral, availability of service, appropriateness of the service and the consumer's choice.

Practice Standards:

Invite individuals who are applying for CVS services, and their families, to an information session to discuss:

- ? Introduction to CVS
- ? History
- ? CVS Staff & People Structure (i.e. board, staff, volunteers)
- ? CVS Mission and Service Philosophy
- ? CVS Services

The following topics are covered in an understandable manner:

- ? Tour of the building and introductions to individuals, staff, volunteers (where possible and appropriate)
- ? Review and discussion of policies & procedures relevant to consumers, including rights and responsibilities, consent, advocacy, health and safety, complaints, planning, and record keeping.

Ask consumers requesting services to complete an application/intake form.

Upon receipt of the completed application form, date it and determine eligibility of the applicant. Eligibility is according to the MCFD Contract.

If the applicant is deemed eligible, conduct an intake interview with the individual, include others as appropriate (family, advocate, Representative, referral source). The purpose of this interview is to:

- ? Identify capacity within requested services;
 - ? Determine if the services requested will meet the applicant's needs;
 - ? Complete a consent for service; and
 - ? Gather relevant information about the applicant.
-

CVS POLICY & PROCEDURE MANUAL

Make the intake decision after the interview, in conjunction with the program supervisor and manager. The options are accepted, referred or waitlisted.

Criteria for acceptance will be based on:

- ? Urgency of the consumer need;
- ? Availability in the service requested;
- ? Consumer suitability and appropriateness of the service to meet the needs; and
- ? Date of application.

Notify the individual and referral source in writing of the decision and reasons for it. Provide the individual with the opportunity to confirm, if s/he is accepted.

If the person is not eligible, advise the individual and referral source of the reasons and provide suggestions for alternative services.

If a consumer is waiting for services, once the service becomes available, initiate the “getting to know you” and skills, abilities, preferences and needs aspects of the individual planning process. This should be started before the consumer enters the program or service. See Policy for Individual Planning.

Policy Audit: March Annually

Date Issued: March 2004

Date Revised:

Position

Responsible: Executive Director or Designate

References:

- ☞ This policy replaces waitlist, eligibility, ID (SD/RRC 014)
- ☞ Policy 5.10 A & B – Individual Planning & Documentation
- ☞ Policy 5.9 – Consumer Consent
- ☞ SDA 5.18.A – Personal Information Form
- ☞ SDA 5.18.B - Client Orientation Checklist
- ☞ Consumer Handbook
