Sample Policy and Procedures Manual and Resource Kit for HACC Social Support Programs

Version 2

Aged Services Network Western Region
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The Sample Policy and Procedures Manual and Resource Kit for HACC Social Support Programs has been developed by the Aged Services Network-Western Region as part of its HACC regional training function. The resource is available to HACC funded agencies to adapt and reproduce in the development of their policies and procedures.

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Caveat

The Sample Policy and Procedures Manual and Resource Kit for HACC Social Support Programs is consistent with the HACC National Service Standards and the relevant requirements of the HACC National Standards Agency Instrument and Agency Assessment (March 2003) for the policy areas covered. However this document is not a Department of Human Services Home and Community Care Policy document, nor do the practices referred to in the sample policies, procedures and supporting documents necessarily reflect ‘best practice’.

The information provided here is provided on the basis that all persons accessing this resource undertake responsibility for assessing the relevance and accuracy of its content.

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References

This resource was compiled using and adapting materials from the following resources:

- Effective Change, 2003, *Volunteer Management Resource Kit*
- Victorian Government Department of Human Services, 2002, *Service Coordination Tool Templates*
- Western Region Cross Alliance Primary Care Partnerships, 2002,*DIY Privacy for Primary Care Agencies*
- Western Region Primary Care Partnerships, 2000, *Service Coordination Best Practice & Continuous Improvement Manual- First Edition*
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Introduction

This resource was developed as part of the Aged Services Network–Western Region’s Social Support Programs Policy and Procedures Project (SSPPPP). The SSPPPP commenced in January 2005 and was completed in January 2006. The SSPPPP provided mentoring and support to five Western Metropolitan Region HACC social support agencies to develop polices and procedures that were in accordance with the HACC National Service Standards and reflected individual agency practice. This project was initiated to assist small, social support agencies to implement their individual agency ‘Action Plan’ from the 2003 HACC National Service Standards Agency Assessments.

During individual mentoring sessions, each agency participating in the SSPPPP reviewed their existing policy documents in relation to their agency ‘Action Plan’ then wrote new policy to fill some of the identified gaps. A number of group workshops were conducted to continue the work of the mentoring sessions. Later in the year, an additional series of workshops were conducted involving some of the agencies who participated in the mentoring phase of the project, as well as two additional social support agencies who wanted to review and adapt their agency’s policies and procedures.

This resource was developed out of the policy and procedures, and supporting materials (forms, form letters, consumer information material, checklists), that were developed during the SSPPPP. Therefore this resource is a product of the combined effort of the participating agencies and the project consultant. The resource also borrowed from other resource guides and other agencies policies and procedures documents.

This resource uses, as its foundation, the structure and content of the Sample Planned Activity Group Policy and Procedure Manual (1998) developed by Effective Change and Moreland Community Health Service. During the SSSPP, the structure and content of the Sample Planned Activity Group Policy and Procedure Manual (1998) was adapted or updated, or in some areas completely rewritten, to suit the needs of the participating agencies and to take into account the requirements of the Service Coordination Tool Templates and the National Service Standard Agency Assessment initiatives. As well as adapting the content of the Sample Planned Activity Group Policy and Procedure Manual (1998), the agencies and the project consultant developed new supporting materials to support the policy document including, forms, form letters, consumer information and checklists.
About the resource

This resource contains sample policies and procedures that can be adapted and changed to meet individual agency requirements. It also contains a range of supporting materials (forms, form letters, consumer information materials and checklists) that support these policies and procedures. The resource is available to HACC agencies delivering social support programs in the development of their policies and procedures.

In the future, the Aged Services Network Western Region may post updates or additions to this document on their website, so check the website http://cotavic.org.au/asn for updates.

The policies, procedures and supporting materials in this resource were written for the agencies who participated in the SSPPPP. Most of the participating agencies were small, ethno-specific social support agencies whose HACC funded activities consisted of Planned Activity Group (core and/or high) and Friendly Visiting Program. Therefore the policies and procedures and supporting materials contained within this resource are written for agencies with this profile. Agencies using this resource should adapt these policies, procedures and supporting materials to suit their own agency profile and practices.

This resource is not a complete policy document. It focuses primarily on the direct service component of agency activity, including:

- Eligibility
- Referral
- Assessment
- Waiting List
- New Consumers
- Consumer Absences
- Discharge
- Refusal of Service
- Communication
- Rights and Responsibilities
- Individual Advocacy
- Consumer Complaints
The resource also contains a section on:

- Privacy and confidentiality.

The resource **does not** include policies on human resources, health and safety or quality improvement.

The document is divided into three sections:

Section 1  -  Policies and Procedures - Working with consumers

Section 2  -  Policies and Procedures – Privacy and confidentiality

Section 3  -  Supporting Materials

Most policies in Section 1 are accompanied by a procedure. Section 2 does not contain procedures. Most policies are also linked to a number of supporting materials that agencies may wish to adapt for their own use.

In some sections of the resource, gaps are left in the text so that agencies can fill in the appropriate information. These gaps are denoted with an `xx`. Instructions regarding the type of information that agencies should enter into these gaps are written in blue next to the `xx`. 
Section 1

Working with Consumers:
Policies and Procedures
1.1 The Service policy statement

We will provide culturally responsive, consumer and community oriented, social support services to frail, older people and younger people with disabilities who are from the xx-language/cultural/ethnic group and live in the xx-region of Melbourne.

We will do this by providing:

- programs that maintain and enrich our consumers’ ability to live independently at home and in the community
- our consumers with opportunities for social support and engagement

Our programs and activities will be oriented towards our consumers’, and target communities’, needs and aspirations. We recognise that these needs and aspirations can be physical, emotional, intellectual, recreational, cultural, linguistic, and/or spiritual.

**HACC services provided by our organisation**

**Friendly Visiting Program**

*xx-Area*

**Telelink**

*xx-Day Time*

*xx-Day Time*

**Planned Activity Group**

*xx-Day Location Target Group*

*xx-Day Location Target Group*

*xx-Day Location Target Group*

*xx-Day Location Target Group*

Date policy authorised__________________
Person/position responsible for authorisation__________________________________________

Policy review date__________________
Person/position responsible for policy review__________________________________________
1.2 Eligibility policy statement

People are eligible for our Planned Activity Groups if:

- They are from the *xx-language/cultural/ethnic group*
- They live in the *xx-region/LGA*
- They are from either the HACC Core or High target groups:
  - Core: Older people and people with disabilities who are physically independent and cognitively aware
  - High: Frail older people, or people with disabilities requiring assistance with personal care. People with dementia.
  - They are carers of the above groups
- Their level of need is consistent with the level of service we are able to offer
- They will benefit from the program we offer

People are eligible for our Friendly Visiting program if:

- They are from the *xx-language/cultural/ethnic group*
- They live in the *xx-region/LGA*
- They are socially isolated
- They are frail older people, or people with disabilities, or carers of the former.
- Their level of need is consistent with the level of service we are able to offer
- They will benefit from the program we offer

As our service is targeted toward the *xx language/cultural/ethnic group*, our target group fits within the HACC special needs group, ‘people from culturally and linguistically diverse backgrounds’. We will ensure that our services are sensitive to, and inclusive of, the diversity within our target group.

Priority of access will be given to the other HACC special needs groups that form a subsection of the target group. These special needs groups include:

- People living in remote and isolated areas
- People who are financially disadvantaged

Eligibility criteria are applied in a systematic, fair, equitable and non-discriminatory manner. Consumers and potential consumers are informed of the eligibility requirements.
Eligibility means that a person meets the eligibility criteria and is eligible to be assessed and prioritised for service provision. Therefore, eligibility does not mean a person is automatically provided with a service.

Eligibility criteria will be used to assess eligibility when a potential consumer first contacts the service. Eligibility criteria will also be used to assess consumer’s ongoing eligibility to receive services.
procedure eligibility

related policies and procedures

1.3 Referral
1.4 Assessment
1.9 Refusal of Service
1.10 Communication
1.3 Referrals

Policy Statement

Referrals from consumers and other service providers are encouraged. Referrals are made in accordance with consumer’s needs and preferences.

All referrals that are made and received by our organisation are carried out in accordance with the procedures and protocols documented in the Western Metropolitan Region Service Coordination Best Practice & Continuous Improvement Manual. If we receive or make referrals outside of the Western Metropolitan Region (WMR) we will adapt our processes in accordance with the relevant regional protocols where they differ from those established in the WMR.

Making a referral

Our organisation refers consumers on to other services if;

- At initial contact or after assessment, the consumer is ineligible for service or the service does not meet the consumer’s needs and preferences or the consumer requires additional services
- After admission to the program, the consumer’s needs change and additional services are required
- When the consumer exits the service and requires an alternative service

In these cases, we will:

- Inform the consumer why we think a referral may be of benefit and provide information about the organisation to whom we think a referral is appropriate
- Proceed only if the consumer consents to the referral
- Establish whether the consumer wishes to make contact with the service themselves and/or wishes the worker to make the referral
- Seek the consumers consent to provide information about the consumer to the service receiving the referral (Consumer Consent Form-SCTT)
- Follow up the outcome of the referral processes

Outgoing Referrals will be made using the following SCTT tools:

- Confidential Referral Cover Sheet
- Consumer Information
- Living and Care Arrangements
- Summary and Referral
• Consumer Consent (completed but not sent with referrals)

**Information about other services**
Consumers are provided with information, relevant to their needs and preferences, about other services:

- During, and as a follow up to assessment and/or reassessment
- As part of guest speaker/health education program and community education sessions (PAG consumers only)

**Receiving a referral**
Individuals can either be self-referred, or referred by family, friends or another organisation. If the consumer is referred by another organisation, acknowledgment of receipt of referral is made within two working days to the referring organisation. Once a referral is received, contact is made with the consumer and initial screening against the eligibility criteria is undertaken. If the consumer is ineligible we will explain to the consumer why they are ineligible and under what circumstances, if any, they can apply again. If the consumer meets the eligibility criteria, assessment will be arranged within two weeks of initial contact.
procedure making a referral

Is a referral required?

- No further action required
  - Discuss referral options with consumer (or appropriate person) e.g. service options, service constraints, self-referral vs referral, referral pathways, privacy and confidentiality

- Does consumer require and want a referral?
  - No further action required
  - Provide consumer with contact information

- Does consumer wish to self-refer?
  - Document consumer's decision to self-refer


- Have all relevant parts of the SCTT been completed?
  - Complete all relevant parts of the SCTT

- Explain disclosure of SCTT data to consumer

- Has consumer consent to disclose information been obtained and documented?
  - Document consumer's decision
  - Follow up

- Give consumer copy of Consumer Consent Form

- Complete referral cover sheet

- Send referral in accordance with privacy and confidentiality procedure

- Document referral details on consumer record

- Have you received acknowledgment?
  - No
    - Document details on consumer record
  - Yes
    - Follow up

- Have you received information on referral outcomes?
  - No
    - Document details on consumer record
  - Yes
procedure receiving a referral

- Is consumer eligible?
  - Yes: Acknowledge receipt of referral using the Referral Acknowledgement Form
  - No: Send referral acknowledgement form to initiating agency. Notify initiating agency that consumer not eligible and reason/s why. Destroy referral information in accordance with the Health Records Act.

- Contact consumer and discuss service options, waiting times, assessment processes

- Does the consumer wish to proceed?
  - Yes: Assess consumer
    - Notify referring agency of outcome (ie not eligible, placed on waiting list, offered service) using Referral Outcome Form
  - No: Take appropriate action
    - Are you satisfied that Duty of Care requirements are met?
      - Yes: Notify referring agency that consumer does not wish to proceed
      - No: Document on consumer record

- Document on consumer record
related policies and procedures

1.2 Eligibility
1.4 Assessment
1.10 Communication
2.1 Consumer Privacy, Confidentiality and Access to Personal Information
2.2 Collection of Information
2.3 Use and Disclosure
2.4 Privacy and Confidentiality Complaints
2.5 Access and Correction
2.6 Consent
2.7 Authorised representative
2.8 Security and Quality of Information
1.4 Assessment policy statement

Once consumers have been screened against the eligibility criteria, they are then assessed and prioritised for services. Assessments will happen within two weeks of initial contact. Our organisation does not undertake comprehensive assessments. Assessments undertaken are limited and restricted to the data collected with the Service Coordination Tool Templates (SCTT) and our service specific assessment form. Assessments are undertaken with the following tools:

- Consumer Information (SCTT)
- Living Arrangement Profile (SCTT)
- Consumer Consent Form (SCTT)
- Functional Assessment Summary Template (SCTT)
- Service Specific Assessment (see 3.6 *Sample Form* Service Specific Assessment)

Consumers and carers are informed about the assessment process, and its purpose and outcomes. Assessments will be conducted in the consumer’s preferred language wherever possible. All assessments will be consumer centred, where a consumer’s preferences and perspectives are valued and respected. All consumers undergoing assessment will be informed about other relevant services, both within and outside our organisation, and referred to these services if the consumer wishes.

Before seeking a consumer’s consent to collect the information required for assessment we will inform the consumer about:

- what kinds of information we wish to collect and our purposes for collecting such information
- their rights to privacy and confidentiality
- their right to refuse to give personal information and the consequences of such a refusal
- their right to access their personal information
- their right to complain if they think their health information has been collected used or stored inappropriately.

Consumers Assessed as Eligible

If, after assessment, a consumer still meets the eligibility criteria and wishes to participate in the program they will be, depending on places available, either offered
a place in the program or they will be offered a place on the waiting list where they will be prioritised for service.

Consumers offered a place in the program will be sent an offer letter (see 3.2 Form Letter Offer of Service) and information about the program (3.15 Consumer Information Welcome to the xx Planned Activity Group. or 3.16 Consumer Information Welcome to the xx Volunteer Coordination Program). All new consumers will be oriented to the service through an orientation session.

Consumers offered a place on the waiting will be offered this place both verbally and in writing and will be given information on the waiting list (see 3.11 Consumer Information Waiting List).

Eligible consumers who choose not to take up either a place on the waiting list or a place in the program will be sent a letter acknowledging their choice and explaining how they can gain access to services in the future (see 3.3 Form Letter Consumer Refusal of Offer of Service).

**Consumers Assessed as Ineligible**

If, after assessment, the organisation decides a consumer is assessed as ineligible for service they will be notified of their ineligibility, both verbally and in writing, given information on how to appeal the organisation’s decision if they choose to do so (see 3.13 Consumer Information Making a Complaint/ 3.14 Consumer Information Using an Advocate) and given information on how and under what conditions they can apply for services in the future (3.1 Form Letter Ineligible Consumers).

**Reassessment**

Consumers, whether on a waiting list or participating in the program, are reassessed every xx months to determine whether their needs have changed. The date for reassessment will be scheduled at the initial assessment.

At reassessment all information previously collected with the following assessment tools will be checked to ensure it is accurate and current:

- Consumer Information (SCTT)
- Living Arrangement Profile (SCTT)
- Consumer Consent Form (SCTT)
- Functional Assessment Summary Template (SCTT)
- Service Specific Assessment (see 3.6 Sample Form Service Specific Assessment Form)

The reassessment date will be recorded on the Service Specific Assessment (see 3.6 Sample Form Service Specific Assessment Form).
Reassessment will also be used as an opportunity to remind about:

- their rights and responsibilities
- how to make a complaint/use an advocate
- rights in relation to privacy and confidentiality
procedure assessment

Screen consumer as eligible at initial contact and schedule for an assessment interview

Give consumer information about the organisation, services offered, confidentiality requirements and the assessment process

Seek consumer consent to collect information

Complete relevant sections of the SCTT

Complete program specific assessment

Does the consumer still meet the eligibility criteria and program requirements?

Yes

Does the consumer still wish to gain access to services?

Yes

Is there a place available in the program?

Yes

Formally offer consumer a place in the program both verbally and in writing

Notify referring agency of outcome

Schedule orientation

Schedule date for reassessment

Inform the consumer both verbally and in writing about:
- the reasons that they are not eligible for service
- under what changed circumstances they may be eligible in the future
- how to appeal the decision to refuse service if the consumer believes it has been unfair or incorrect

Inform the consumer both verbally and in writing:
- of their right to reapply in the future
- that previous refusal will not disadvantage them if they wish to apply in the future

Refer, if the consumer wishes, to an appropriate service

Inform referring agency of outcome

Give consumer waiting list, complaints and advocacy information

Does the consumer wish to be placed on a waiting list?

Yes

Inform referring agency of outcome

Schedule date for re-assessment

No

No
related policies and procedures

1.2 Eligibility
1.3 Referral
1.5 Waiting List
1.6 New Consumers
1.9 Refusal of Service
1.13 Complaints
1.12 Advocacy
1.10 Communication

2.1 Consumer Privacy, Confidentiality and Access to Personal Information
2.2 Collection of Information
2.3 Use and Disclosure
2.4 Privacy and Confidentiality Complaints
2.5 Access and Correction
2.6 Consent
2.7 Authorised representative
2.8 Security and Quality of Information

related resource material

3.1 Form Letter Ineligible Consumers
3.2 Form Letter Offer of Service
3.3 Form Letter Consumer Refusal of Offer of Service
3.6 Sample Form Service Specific Assessment Form
3.11 Consumer Information Waiting List
3.13 Consumer Information Making a Complaint
3.14 Consumer Information Using an Advocate
3.15 Consumer Information Welcome to the xx Planned Activity Group
3.16 Consumer Information Welcome to the xx Volunteer Coordination Program
1.5 **Waiting List**

**Policy Statement**

When the number of eligible consumers wishing to participate in a particular program exceeds the number of places available in the program, a waiting list will be established. This waiting list will be used to prioritise eligible consumers for service. Priority of access will be given to those consumers, relative to other consumers on the list, with the highest need and/or those from HACC special needs groups.

The following factors will be taken into account when prioritising consumers for service.

Whether the consumer experiences any of the following factors:

- Social isolation
- Little or no family support
- Living alone
- Difficulty with a range of tasks of daily living
- Multiple disabilities and complex support needs

Whether the consumer is from one or more of the following HACC special need groups:

- Culturally and Linguistically Diverse
- Aboriginal and Torres Strait Islander Background
- Living in remote and isolated areas
- Financially disadvantaged

In addition, whilst we do not provide direct services for carers, the consumer carer relationship is taken into consideration when prioritising consumers for service. The following factors are considered.

- The carer is the primary carer, has limited support networks
- The carer is frail, ill, distressed or has a disability
- The carer has extensive commitments
- The carer is socially or geographically isolated and
- The carer is financially disadvantaged
Consumers who are placed on the waiting list will be informed both verbally and in writing about the waiting list process (see 3.11 Consumer Information Waiting List) and their right to appeal a decision or make a complaint (3.13 Consumer Information Making a Complaint/3.14 Consumer Information Using an Advocate).

A waiting list form will be regularly reviewed and updated (see 3.7 Sample Form Waiting List). The following information will be recorded on the waiting list form.

- Name
- Date commenced on waiting list
- Dates contacted while on waiting list
- Dates reassessed
- Date exited waiting list
- Reason for exiting waiting list – entered program/other
- Priority ranking
- Which HACC special needs groups is the consumer from?

All consumers on the waiting list will receive regular contact from the organisation. This contact will occur approximately every xx weeks/months. If lengthy delays in admission to the service are anticipated, consumers and carers are informed and advised of their options, including referral to another suitable organisation.

Consumers on the waiting list will be reassessed every xx months to determine whether their needs, eligibility status and contact details have changed.

Waiting lists will be reviewed annually to identify any improvements that could be made to the waiting list process. Waiting lists will be reviewed to determine whether the waiting list has been functioning equitably and efficiently and to identify ways of shortening the length of time people spend on waiting lists.

Date policy authorised ________________
Person/position responsible for authorisation ________________________________

Policy review date ________________
Person/position responsible for policy review ________________________________
procedure waiting list

Consumer assessed and offered place on the waiting list

Give consumer waiting list and complaints information

Does the consumer wish to be placed on the waiting list?

no

Inform the referring agency

Inform the referring agency verbally and in writing:
- of their right to reapply in the future
- that previous refusal will not disadvantage them if they wish to apply in the future

Refer, if consumer wishes, to an appropriate service

yes

Prioritise consumer against other consumers on the waiting list using level of need categories and HACC special needs categories

Add consumer details to waiting list proforma

Contact consumer every xx weeks to determine whether consumer wishes to remain on list. Conduct reassessment on scheduled date. Document organisation's contacts with consumer on waiting list proforma.

Does the consumer wish to remain on the waiting list?

no
related policies and procedures

1.2 Eligibility
1.3 Referral
1.4 Assessment
1.10 Communication
1.12 Advocacy
1.13 Complaints

related resource material

3.7 Sample Form Waiting List
3.11 Consumer Information Waiting List
3.13 Consumer Information Making a Complaint
3.14 Consumer Information Using an Advocate
1.6 **New consumers**

**policy statement**

New consumers are welcomed and oriented to the program.

Orientation to the program should be positive, welcoming and informative.

All new consumers will attend an orientation interview. This interview will be scheduled once a consumer is assessed as eligible and formally offered a place in the program.

At the orientation interview, care will be taken not to overwhelm the consumer with new information. Orientation interviews will be conducted in a consumer’s preferred language and written information will be given, where possible, in a format and language suitable to a consumer’s specific needs. If a consumer is unable to read, information will be given verbally. Written information will be offered to consumers who cannot read so that a family member, friend or carer can access the written information. The worker conducting the orientation interview will take care to ensure a consumer understands the information being given to them.

Written information will be provided to the consumer in a New Consumer Information Kit (see 3.17 Checklist New Consumer Information Kit Checklist).

The kit includes:

- Rights and Responsibilities Statement (see 3.12 Consumer Information Rights and Responsibilities)
- ‘Making a Complaint’ (see 3.13 Consumer Information Making a Complaint)
- ‘Using an Advocate’ (see 3.14 Consumer Information Using an Advocate)
- Emergency procedures (PAG)
- Organisational Chart
- Newsletter
- Organisation’s contact details
- New Consumer Information Material (3.15 Consumer Information Welcome to the xx Planned Activity Group. or 3.16 Consumer Information Welcome to the xx Volunteer Coordination Program).
- ‘Your information. It’s Private’ brochure
During the orientation session the worker will go over the kit with the consumer and answer any questions the consumer might have.

Orientation to the PAG will occur before/during/after a PAG session.

During orientation to a Planned Activity Group the staff member conducting the orientation will complete the Orientation Session Checklist-Planned Activity Group (see 3.18 Checklist Orientation Session Checklist-Planned Activity Group) as they do the following:

- Introduce the consumer to staff and other group members
- Explain the daily routine of a PAG session
- Explain the layout of the centre including emergency exits and procedures
- Ensure the consumer has a copy of, and has read, the consumer orientation kit
- Explain the contents of the consumer orientation kit
- Answer consumers concerns or questions

Orientation to the Friendly Visiting program will occur in the consumer’s home.

During orientation the staff member conducting the orientation will complete the Orientation Session Checklist-Friendly Visiting (see 3.19 Checklist Orientation Session Checklist- Friendly Visiting) as they do the following:

During an orientation to the Friendly Visiting program the:

- Coordinator will introduce the consumer to the volunteer
- Ensure the consumer has a copy of, and has read, the consumer orientation kit
- Explain the contents of the consumer orientation kit and answer consumers concerns or questions
- Ensure that both the consumer and the volunteer understand the boundaries and limits to the volunteer’s role.

Date policy authorised

Person/position responsible for authorisation

Policy review date

Person/position responsible for policy review
procedure new consumers

Arrange orientation session for new consumer

Brief staff/volunteer about new consumer

Conduct orientation session, ensuring that you:
- Welcome new consumer
- Introduce consumer to staff and other group members/volunteer
- Explain the daily routine of PAG session/volunteer visit
- (for PAG only) Explain the layout of the centre including emergency exits and procedures
- Ensure the consumer has a copy of, and has understood, the ‘New Consumer Orientation Kit
- Explain the contents of the consumer orientation kit
- Complete ‘New Consumer Orientation Session Checklist
- Answer consumer’s concerns or questions

Monitor new consumer’s participation in the program
related policies and procedures

1.10 Communication
1.11 Rights and Responsibilities
1.12 Advocacy
1.13 Complaints

related resource material

3.12 Consumer Information Rights and Responsibilities
3.13 Consumer Information Making a Complaint
3.14 Consumer Information Using an Advocate
3.15 Consumer Information Welcome to the xx Planned Activity Group
3.16 Consumer Information Welcome to the xx Volunteer Coordination Program
3.17 Checklist New Consumer Information Kit Checklist
3.18 Checklist Orientation Session Checklist- Planned Activity Group
3.19 Checklist Orientation Session Checklist- Friendly Visiting

Date policy authorised ________________
Person/position responsible for authorisation __________________________________________

Policy review date ________________
Person/position responsible for policy review ________________________________________
1.7 Consumer Absences

Policy Statement

Consumers will be requested to provide as much notice as possible (preferably a week or more) if they are unable to attend their PAG session or FV appointment. We require at least 24 hours notice of absence for those consumers receiving transport, subsidised by our organisation, to the PAG venue.

Absences without notification

If a consumer is absent without notice, emergency procedures will be initiated. The relevant staff member/volunteer will notify the coordinator of a consumer’s absence. The coordinator will then attempt to contact the consumer. If the coordinator is unable to contact the consumer they will contact the carer/next of kin to determine the consumer’s whereabouts.

If they receive no response from the carer/next of kin they will contact a local medical officer to find out if the consumer has been hospitalised. If the coordinator still hasn’t discovered the consumer’s whereabouts the coordinator will contact the police and/or ambulance if required.

After an emergency situation the coordinator will keep contact with the consumer or next of kin until the consumer either returns to the group is discharged from the group.

If a consumer continues to be absent without notification, and without an adequate reason for failing to give notice, for three or more PAG sessions/volunteer visits the coordinator will contact the consumer to attempt to resolve any barriers or problems that are preventing the consumer from giving adequate notice of absence or any problems or barriers that prevent the consumer from attending the group/volunteer visit. The coordinator will also remind the consumer and/or carer that continued absences may result in a cessation of services. If the consumer continues to be absent without notice the coordinator will initiate discharge procedures.

If a consumer is continually absent without notification and without an adequate reason for failing to give notice, such as an emergency situation, they may be charged for any transport costs incurred by organisation.

Ongoing absences with notification

If a consumer is absent for long periods of time periods of time the coordinator will review, in consultation with the consumer, the consumers continued participation in the program. If the consumer is absent for an extended period due to an illness, or some kind of degeneration in their abilities, the coordinator will assess whether the
consumer still fits the eligibility criteria for the group they are attending. If the consumer does not fit the eligibility criteria the coordinator will either initiate discharge procedures or discuss with the consumer the possibility of moving to a higher needs group (if group and a place in the group is available) within the organisation.

**High number of absences from a group at a given time**

If a high number of consumers are absent from a group at any given time the coordinator will:

- investigate the reason for these absences
- determine if the program is viable to run
- review staff ratios

Date policy authorised
Person/position responsible for authorisation
Policy review date
Person/position responsible for policy review
procedure  emergency procedure - single absence without notice

Consumer does not attend planned activity group or volunteer visit. No notice given.

Coordinator to contact consumer, carer/next of kind or local medical officer to determine consumer's whereabouts.

Has Coordinator determined the consumer's whereabouts?

- Yes
  - Does the consumer require a referral?
    - Yes
      - Initiate referral procedure
    - No
      - Notify police and request that they attend consumer's house
    - No
      - Maintain contact with carer/consumer until consumer returns to group or is discharged
  - No
    - Notify police and request that they attend consumer's house

Debrief staff if necessary

Note consumer absence and reason for absence on consumer record

If consumer returns to the group, remind consumer to give notice of absence where possible.
procedure - continued absence

Consumer continually absent without giving notice

Staff/volunteer notify coordinator when a consumer is absent without notice for three sessions/visits

Coordinator contacts consumer

Does the consumer wish to continue to participate in the program?

Yes

Does the consumer still meet the eligibility criteria?

Yes

Are there actions the organisation can take to assist the consumer to give adequate notice and attend?

Yes

Remind the consumer (verbally and in writing) that continued absences without notification will result in a cessation of services

Has the consumer continued to be absent without notice for six or more sessions in total?

Yes

Initiate discharge procedure

No action required

Take action

Take action

No

Initiate discharge procedure

Consumer continually absent but has provided notice

Staff notify coordinator when a consumer has been frequently absent but has provided notice

Coordinator contacts consumer

Does the consumer wish to continue to participate in the program?

Yes

Does the consumer still meet the eligibility criteria?

No

Develop a plan with the consumer for their return to the group and set a discharge date should the absences continue

No

Are there actions that the organisation can take to assist the consumer in attending?

Yes

Has the consumer continued to be absent?

Yes

Initiate discharge procedure on the date previously determined with the consumer
related policies and procedures

1.2 Eligibility
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1.9 Refusal of Service
1.10 Communication
1.11 Rights and Responsibilities
1.12 Advocacy
1.13 Complaints
1.8 Discharge policy statement

All consumers leaving the program are offered support when moving to other care arrangements. Where possible the discharge and the transition to other care arrangements will be planned to provide minimal disruption to the consumer. With the permission of the consumer, appropriate information will be forwarded to organisations involved in the ongoing care of the consumer.

Consumers may initiate their own discharge, or the organisation may initiate a discharge of a consumer.

All consumers who leave the program will be encouraged to feedback any ideas they have for service improvement as well as their positive and negative experiences of the organisation’s programs and procedures. Policies and practices are reviewed in light of consumer feedback. If a consumer decides not to give feedback to the organisation their decision will be respected.

Discharge is initiated by the organisation if a consumer’s needs or circumstances change so that they no longer meet the eligibility criteria. The organisation may also initiate discharge if a consumer is continually absent from the program without giving adequate notice or when a consumer’s continued participation poses a significant detrimental effect on other participants or staff. The organisation’s decision to initiate discharge will be fair, consistent and transparent.

If the organisation initiates discharge, the consumer will be informed about:

- The reasons why the organisation has determined the consumer ineligible for service
- When, how and under what conditions they may be able to gain access to services should their circumstances/needs change
- How to appeal the decision if a consumer believes the organisation’s decision to refuse service has been unfair or incorrect
- Consumers will also be informed that:
  - Any consumer who has previously been refused service for any reason will not discriminated against should they wish to reapply in the future
  - The organisation can discuss appropriate other services and arrange a referral should the consumer require this assistance

This information will be given to the consumer both verbally and in writing (see 3.5 Form Letter Organisation Initiated Discharge)
If the organisation initiates a discharge the consumer will be given one month’s notice that services will cease unless duty of care or occupational health and safety concerns necessitate a more immediate cessation.

If a consumer wishes to leave the program, the organisation will, both verbally and in writing (see 3.4 Form Letter Consumer Initiated Discharge):

- Acknowledge the consumer's decision and confirm a cessation date
- Explain that the consumer is welcome to re-apply for services in the future
- Explain that the consumer’s decision to leave will not disadvantage them should they wish to reapply in the future
- Inform the consumer that the organisation can discuss appropriate alternative services and arrange a referral should the consumer wish it
- Request that the consumer participate in a feedback interview
procedure discharge

Did the consumer or the organisation initiate the discharge?

ORGANISATION INITIATED DISCHARGE
Both verbally and in writing explain to the consumer:
- The reasons why the organisation has decided to initiate a discharge
- Under what changed circumstances they may be able to gain access to services in the future
- How to make a complaint if the consumer believes the decision to discharge has been unfair or incorrect
- That any consumer who has previously been refused service for any reason will not be discriminated against should they wish to reapply in the future
- That the organisation will discuss appropriate other services and arrange a referral should the consumer require this assistance
- That the organisation would value their feedback about services

CONSUMER INITIATED DISCHARGE
Both verbally and in writing:
- Acknowledge the consumer’s decision to cease services
- Explain that the consumer is welcome to reapply for services in the future
- Explain that the consumer’s decision to leave will not disadvantage them should they wish to reapply in the future
- Inform the consumer that the organisation will discuss appropriate alternative services and arrange a referral should the consumer require this assistance

Are there any occupational health and safety or duty of care issues that necessitate an immediate cessation of service?

yes → Notify consumer, both verbally and in writing, that services are to cease immediately

no → Develop a timeline for leaving the service, confirm cessation date and discuss referral options

Is consumer willing to participate in a feedback interview?

yes → Conduct interview and document consumer feedback

no → Does the consumer want to be referred to another agency?

yes → Refer consumer to another agency

no → Cease services
related policies and procedures

1.2 Eligibility
1.3 Referral
1.7 Consumer Absence
1.9 Refusal of Service
1.10 Communication
1.12 Advocacy
1.13 Complaints

related resource material

3.4 *Form Letter* Consumer Initiated Discharge
3.5 *Form Letter* Organisation Initiated Discharge
3.13 *Consumer Information* Making a Complaint
3.14 *Consumer Information* Using an Advocate
1.9 Refusal of service

policy statement

Refusal of service initiated by the organisation

We will refuse service to consumers, or prospective consumers, if they do not meet the program eligibility criteria.

A refusal of service can occur at:
- the point of initial contact
- after initial assessment
- after a consumer has commenced services

We will also refuse services to consumers who have commenced services if the consumers are continually absent from the program without giving adequate notice or if their continued participation poses a significant detrimental effect on other participants or staff. In these cases we will make every attempt to work with the consumer to resolve the problem before we decide to refuse services. (see 3.1 Form Letter Ineligible for Services/3.5 Form Letter Organisation Initiated Discharge)

When we refuse services to a consumer, the consumer will be informed about:
- The reasons why they have been refused service
- When, how and under what conditions they may be able to gain access to services should their circumstances/needs change
- How to appeal the decision if a consumer believes our decision to refuse service has been unfair or incorrect
- Consumers will also be informed that:
  - Any consumer who has previously been refused service for any reason will not discriminated against should they wish to reapply in the future
  - The organisation can discuss appropriate other services and arrange a referral should the consumer require this assistance

If a consumer is refused service at the point of initial contact they will be given the above information verbally. If a consumer is refused service after initial assessment or once they have commenced services, they will be given the above information both verbally and in writing.

All consumers who are refused service will be encouraged to feedback any ideas they have for service improvement.
Refusal of service by consumer

Consumers have a right to refuse an offer of service or withdraw from services. Consumers can refuse services upon an offer of service. Consumers can also refuse services once they have commenced services.

When consumers are offered services, or once consumers have commenced services, they are informed of the right to refuse services. Consumers are also informed that, should they refuse a service, they will not be discriminated against should they wish to reapply for service in the future. Consumers are informed about their right to refuse services, and their right to reapply for services, in the written orientation material that a consumer receives when commencing services. (see 3.15 Consumer Information Welcome to the xx Planned Activity Group/3.16 Consumer Information Welcome to the xx Volunteer Coordination Program)

This material is also verbally explained to the consumer when they are oriented to services.

Consumers do not need to provide an explanation for why they refuse a service. However, consumers are encouraged to participate in a feedback interview where they are asked to share both positive and negative experiences they have of the services and any ideas for service improvement.

When a consumer withdraws from service they are

- informed of their right to apply for services in the future
- informed that they will not be discriminated against should they wish to apply to be reassessed for services in the future
- encouraged to feedback any complaints, concerns or ideas for service improvement

We will acknowledge a consumers refusal of service both verbally and in writing. (see 3.3 Form Letter Consumer Refusal of Offer/3.4 Form Letter Consumer Initiated Discharge)

Date policy authorised_________________
Person/position responsible for authorisation________________________________________

Policy review date_________________
Person/position responsible for policy review______________________________________
procedure refusal of service

For procedure for;
- refusal of service at initial contact (see 1.3 Referral Procedure)
- refusal of service after initial assessment (see 1.4 Assessment Procedure)
- organisation’s/consumer’s refusal of service after services have commences (see 1.8 Discharge Procedure)

related policies and procedures

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1.3 Referral
1.4 Assessment
1.6 New Consumers
1.7 Consumer Absence
1.8 Discharge
1.10 Communication
1.12 Advocacy
1.13 Complaints

related resource material

3.1 Form Letter Ineligible for service
3.3 Form Letter Consumer Refusal of Offer
3.4 Form Letter Consumer Initiated Discharge
3.5 Form Letter Organisation Initiated Discharge
3.13 Consumer Information Making a Complaint
3.14 Consumer Information Using an Advocate
3.15 Consumer Information Welcome to the xx Planned Activity Group
3.16 Consumer Information Welcome to the xx Volunteer Coordination Program
1.10 Communication policy statement

Where possible (resources permitting) all written information given to consumers/carers, as well as discussions that take place between provider and consumers/carers, will be in a consumer’s preferred language. Where written information is not available in a consumers preferred language, or in the case where a consumer is unable to read, staff (either directly or through an interpreter) will verbally explain written information to a consumer and provide written information in English so that a family member, friend or carer can access the information.

In order to provide services in a manner that is culturally relevant and appropriate we may provide less written materials if a consumer is unfamiliar with, or intimidated by, such practices.

We will be responsive to other communication issues such as hearing and sight impairment and comprehension difficulties. Wherever possible we will provide information in a format, for example large font, that best facilitates a particular consumer’s access to relevant information.

All written material that our organisation produces will be in plain language and as short as possible.

During our assessment, referral, orientation, absence and discharge processes, as well as our program activities, care will be taken not to overwhelm the consumer with information.

Our service specific assessment form (see 3.6 Sample Form Service Specific Assessment) will collect detailed information on a consumers communication needs.

We will make our processes transparent and accessible through:
- Keeping consumers informed about the “how” and “why” of decisions and guidelines
- Checking the consumers understanding of explanations offered and information provided,
- The use of clear and simple communication.
- Including carers were appropriate (e.g. early onset of dementia) and with the consumer’s permission
related policies and procedures

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1.3 Referral
1.4 Assessment
1.5 Waiting list
1.6 New consumers
1.8 Discharge
1.9 Refusal of service
1.10 Rights and Responsibilities
1.12 Advocacy
1.13 Complaints

related resource material

3.6 *Sample Form* Service Specific Assessment
1.11 Consumer Rights and Responsibilities

policy statement

Our organisation’s decisions, practices and policies will be guided by, and respectful of, our consumer’s rights and responsibilities. The importance of consumer rights and responsibilities will be emphasised in staff and volunteer training and induction.

All new consumers are informed of their rights and responsibilities as HACC consumers. Each new consumer is given a copy of the Rights and Responsibilities statement (see 3.12 Consumer Information Rights and Responsibilities Statement) in their preferred language. As well as written material, each consumer will be given a verbal explanation of the statement. Consumers are reminded about their rights and responsibilities at the time of reassessment. The staff member reassessing a consumer will record that they have reminded the consumer by ticking the ‘reminded of rights and responsibilities box’ on the ‘Service Specific Assessment Form’ (see 3.6 Sample Form Service Specific Assessment). We will also remind consumers about their rights and responsibilities if it becomes evident at some stage that the consumer has not understood an aspect of rights and responsibilities.

We will communicate the importance of rights and responsibilities by displaying the rights and responsibilities statement on the wall of our offices and venues and occasionally placing an article about rights and responsibilities in our newsletter.
related policies and procedures

1.4 Assessment
1.6 New consumers
1.12 Advocacy
1.13 Complaints
2.1 Consumer Privacy, Confidentiality and Access to Personal Information

related resource material

3.6 Sample Forms Service Specific Assessment
3.12 Consumer Information Rights and Responsibilities statement
3.13 Consumer Information Making a Complaint
3.15 Consumer Information Welcome to the xx Planned Activity Group
3.16 Consumer Information Welcome to the xx Friendly Visiting Program
1.12 Individual Advocacy
policy statement

We recognise and support a consumer’s right to use an advocate when dealing with our organisation or with other organisations. Whenever possible, we will facilitate consumer access to an advocate should a consumer wish us to do so.

Advocate—a Definition: An advocate is a person who supports a consumer to protect and promote their rights and interests. An advocate can, with the consumer’s permission, negotiate on a consumer’s behalf or support the consumer to negotiate for themselves. An advocate does not conciliate or arbitrate between an organisation and consumer. An advocate ‘stands beside’ a consumer to support them to make their own decisions. An advocate is an important resource for a consumer in situations where a consumer feels confused, overwhelmed, intimidated or under-confident. An advocate can be a family member, friend or an outside organisation.

Advocacy in relation to our organisation
We will ensure consumers understand the role of an advocate as well as their right to use an advocate in relation to our organisation. The consumer will be informed, both verbally and in writing (see 3.14 Consumer Information Using an Advocate), about their right to use an advocate and the role of an advocate when the consumer is:

- Assessed and reassessed for services
- Orientated to the program
- Refused service

Or if:

- They wish to make a complaint about the service
- A staff member believes an advocate may be beneficial to the consumer

Staff members within our organisation will not become a consumer’s advocate in relation to our own organisation.

If a consumer chooses to use an advocate, the advocate’s name and contact details will be documented on the Service Specific Assessment Form (see 3.6 Sample Form Service Specific Assessment). If a consumer wishes to change their advocate or no longer use their advocate the advocate’s details will be amended on the Service Specific Assessment form. We will check that advocate details are still current when we conduct a reassessment.
We will not disclose any information about the consumer to an advocate, when the consumer is not present, unless we have the consumer’s express permission to do so. If a consumer wishes us to disclose information to an advocate they will be required to complete an Information Disclosure to Advocate Form (see 3.9 Sample Form Advocate or Other Nominated Person – Information Disclosure).

If an authorised representative is acting on behalf of the consumer, we will require proof of representative authority.

Authorised representatives include:

- Guardians
- Attorneys under enduring powers of attorney
- Agents under the *Medical Treatment Act 1998*
- Administrators under the *Guardianship and Administration Act 1986*
- A person otherwise empowered by the consumers to act or make decisions in the best interests of the person.

Proof of the representative authority will be sighted and a copy of that document placed in the consumers file. Proof of authority includes Guardianship or Administration Order or Enduring/Medical Power of Attorney.

**Advocacy in relation to another organisation**

Our organisation can provide limited individual advocacy to our consumers, in relations to another organisation, where such advocacy falls within the scope of our assessment, care coordination, information provision and referral roles. When a consumer requires more comprehensive advocacy support we will refer them, whenever possible, to another organisation that will provide more comprehensive advocacy support.

**Staff and volunteer orientation and training**

Staff and Volunteer orientation and training programs will include:

- Definition and roles of advocate
- Consumers rights in regards to advocate
- How to work with a consumer and their advocate
- How to encourage and support the use of advocates
- Confidentiality in relation to advocates
- Documentation of advocates
- Information on relevant advocacy services and their services
**Advocates for Consumers with Dementia**

Where it is identified that a consumer with dementia (early signs or advanced) requires the services of someone in the role of an advocate or authorised representative, we will discuss the matter with the consumer, where appropriate, or with the carer. Information will be provided to the consumer / carer about:

- the role of an advocate or authorised representative
- the differences between a known person and professional organisation acting as advocate or authorised representative
- legal options available through the Office of the Public Advocate

The consumer / carer will be provided with assistance to access these services if required and will be encouraged to seek further information about the implications of taking on this responsibility.

Where it is identified that a consumer with dementia is in conflict with the carer or appointed / nominated advocate, we will make a referral to the Office of the Public Advocate to address the issue and encourage the involvement of an advocate from an appropriate advocacy service to help resolve the issue.
related policies and procedures

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1.9 Refusal of service
1.11 Rights and Responsibilities
1.13 Complaints
2.14 Consumer Privacy Confidentiality & Access to Personal Information

related resource material

3.1 Form Letter Ineligible Consumers
3.5 Form Letter Organisation Initiated Discharge
3.6 Sample Form Service Specific Assessment
3.9 Sample Form Advocate or Other Nominated Person – Information Disclosure
3.11 Consumer Information Waiting List
3.13 Consumer Information Making a Complaint
3.14 Consumer Information Using an Advocate
3.15 Consumer Information Welcome to the xx Planned Activity Group
3.16 Consumer Information Welcome to the xx Friendly Visiting Program
1.13 Consumer Complaints
policy statement

Our organisation actively supports a consumer’s right to complain about our services.

We consider a complaint to have occurred when:

- a consumer, or their advocate, tells us that they are unhappy or dissatisfied with;
  - a decision we have made
  - the services we provide
  - the environment we provide services in
  - the way we provide services
  - the staff/volunteers who work in our organisation

and

- the consumer wishes the organisation to acknowledge and respond to their complaint

Complaints about our service, or access to our service, will be dealt with promptly, fairly, confidentially and without retribution.

Our complaints procedures will give consumers access to a fair and equitable process for dealing with complaints and disputes.

Complaints are an important source of consumer feedback and play a valuable role in the ongoing improvement of our services. Therefore, complaints will be welcomed and organisation policy, procedure and practices will be adjusted to respond to complaints where appropriate.

The complaints procedure and a consumer’s right to use an advocate will be explained to a consumer, both verbally and in writing, as part of their orientation when they commence services. During a consumer’s orientation they will be given a copy of ‘Making a complaint (see 3.13 Consumer Information Making a Complaint) and ‘Using an Advocate’ (see 3.14 Consumer Information Using an Advocate). Consumers will also be informed about the complaints procedure if they are refused service at any time. Consumers will be reminded of the complaints procedure when they are reassessed. The staff member reassessing a consumer will record that they have reminded the consumer by ticking the ‘reminded of
complaints/advocate’ box on the ‘Service Specific Assessment’ form. (see 3.6 Sample Form Service Specific Assessment).

When making a complaint all consumers have a right to use an advocate of their choice. This may be a family member or friend, or an outside organisation.

On receiving a consumer complaint, the coordinator or staff member will reassure the consumer that they will receive no retribution for making a complaint. The coordinator or staff member will also reaffirm how seriously complaints and their resolution are taken by our service.

When a complaint is received, the consumer making the complaint will be offered another copy of ‘Making a Complaint’ (see 3.13 Consumer Information Making a Complaint) and ‘Using an Advocate’ (see 3.14 Consumer Information Using an Advocate).

When a complaint is received, the staff member who first receives the complaint will determine whether the complaint is serious or routine using the following criteria:

Serious complaints involve matters that, from the consumer’s perspective, concern:

- Staff or volunteer conduct
- An alleged breach of
  - a consumer’s right or responsibility
  - duty of care
  - consumer/staff safety
  - consumer privacy and confidentiality
- An alleged incident of harassment

Routine complaints include matters that involve operational issues such as:

- Food
- Activities
- Transport arrangements

If a volunteer receives a complaint they should refer the matter to their immediate supervisor. The supervisor should determine the level of the complaint and document the complaint.

**Serious Complaints**
The program coordinator, or designated senior management member, will be informed of all serious complaints within 24hrs. The program coordinator will contact the consumer verbally within 24 hours of being notified of a serious
complaint. The program coordinator will also acknowledge the complaint in writing within 5 working days of being notified of the complaint. The senior management member will investigate complaint-keeping records on the consumer complaint form. After attempting to resolve the complaint with the consumer, the program coordinator will write to the consumer outlining any decisions reached and/or any actions the organisation has taken, or will take, in response to the complaint. This written notification will occur within 10 working days of the complaint acknowledgement letter being sent. If the consumer is dissatisfied with the way the organisation has responded they will be reminded that they are entitled to take the matter further, as per the complaints procedure.

**Routine Complaints**
The staff member receiving the complaint will acknowledge the complaint verbally and attempt to resolve the complaint to the satisfaction of the consumer. If any policy or operational changes are required the staff member will discuss the matter with the program coordinator. The staff member receiving this complaint will respond verbally to the consumer within 5 working days of the complaint being received outlining any actions or decisions that have been taken. If the consumer is dissatisfied with the way the organisation has responded they will be reminded that they are entitled to take the matter further, as per the complaints procedure.

Should a complaint reach a designated management committee member, the management committee member will review the situation by discussing the matter with both consumer and staff. The committee of management member will formally respond to the consumer after the next scheduled committee of management meeting.

**Documenting Complaints**
When a routine or serious complaint is received, the staff member to whom the initial complaint is made will fill out a Consumer Complaint Form (see 3.8 Complaint Form). The form will be kept in a complaints register, which will be kept by program coordinator.

The program coordinator will review the complaints register every 3 months to ensure that complaints have been responded to promptly, fairly and appropriately and that appropriate policy and procedural changes have been made.
Training

All staff orientation and training programs will include:

- How to document complaints
- How to follow the complaints procedure
- The value of complaints to the organisation
- How to support a consumer to make complaint
procedure consumer complaints

Receive complaint

Offer consumer 'making a complaint / using an advocate brochure

Reassure consumer that their complaint will be dealt with without retribution

Register complaint on Consumer Complaint form

Determine level of complaint

ROUTINE COMPLAINT

Resolve at lowest possible level

Notify consumer of any decisions made and strategies taken regarding resolution of complaint within five working days of complaint being received

Record decision on Consumer Complaint form

Make any relevant changes to organisation's policy or practice

Does the consumer wish to take the complaint further?

yes

No further action

no

SERIOUS COMPLAINT

Inform appropriate program coordinator or senior manager within 24 hours

Program coordinator or senior manager to acknowledge complaint verbally within 24 hours and in writing within five working days of complaint being received

Senior management to investigate complaint, keeping records

IF UNRESOLVED
- Remind consumer of their right to take their complaint to the Committee of Management
- Ensure consumer has contact details for relevant Committee of Management member
- Remind consumer of their right to involve an advocate

Committee of Management member(s) to:
- Review the complaint documentation
- Discuss with relevant staff members
- Discuss and attempt to resolve complaint with consumer
- Notify consumer in writing of decisions and actions taken
- Record decision on Complaints Register and in consumer's file notes
- Remind consumer of their right to take the complaint further
- Ensure consumer has contact details for relevant statutory authority and advocacy organisations
- Make any relevant changes to organisation's policy or practice

Has the consumer taken the complaint further?

yes

No further action

no
related policies and procedures

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3.1 Form Letter Ineligible Consumers
3.5 Form Letter Organisation Initiated Discharge
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3.15 Consumer Information Welcome to the xx Planned Activity Group
3.16 Consumer Information Welcome to the xx Friendly Visiting Program.
Section 2

Privacy and Confidentiality: Policies and Procedures
2.1 Consumer Privacy, Confidentiality and Access to Personal Information policy statement

We respect and support a consumer’s right to privacy, confidentiality and access to personal information. Our organisation’s practices and processes for collecting, storing and disclosing consumer information will meet the requirements outlined in the following legislation:

- *The Commonwealth Privacy Act 1998*
- *The Victorian Information Privacy Act 2000*

The following policy statement is divided into 7 sections:

- Collection of Information
- Use and Disclosure
- Complaints
- Access and Correction
- Consent
- Authorised representative
- Security and Quality of Information.
2.2 Collection of Information

policy statement

We will only collect the minimum, individual personal and health information that is necessary for delivering HACC PAG/VC services to a consumer or for purposes that are directly related to the delivery of such services.

Health and personal information will be collected for the purposes of:
- establishing a consumer’s eligibility
- prioritising a consumer’s for services
- assessing a consumer needs
- developing a careplan
- providing data to funding body
- service planning and evaluation (in this situation any identifying information will be removed from the data)

Information collected will be limited to the requirements of the:
- Service Coordination Tool Templates (SCTT)
- 3.6 Sample Form Service Specific Assessment Form
- Minimum Data Set (MDS) form.

We will collect this information only if we have consumer consent, or consent from an authorised person.

Before seeking a consumer’s consent to collect information we will inform the consumer about:
- what kinds of information we wish to collect and our purposes for collecting such information
- their rights to privacy and confidentiality
- their right to refuse to give personal information and the consequences of such a refusal
- their right to access their personal information
- their right to complain if they think their health information has been collected used or stored inappropriately.

We will inform the consumer of the above rights and information both verbally and in written form.
Written material that gives information about privacy and confidentiality and consumer rights with regard to privacy and confidentiality are contained in the following:

- “Your Information, Its Private” brochure
- 3.15 Consumer Information Welcome to the Planned Activity Group
- 3.16 Consumer Information Welcome to the Volunteer Coordination Program Welcome form)
- 3.12 Consumer Information Right and Responsibilities Statement.

At the time of reassessment consumers are reminded of their rights in relation of privacy and confidentiality and access to information as well as their rights and responsibilities as HACC consumers.

Collection of information, provision of information and discussions about consent will be conducted in a private area and, whenever possible, in the consumer’s preferred language.

All information collected by our organisation will be written clearly, simply and legibly. The information collected will not be judgmental and will be respectful of the consumer concerned. Entries in a consumer record will, wherever possible, be formulated in conjunction with the consumer concerned.
related policies and procedures

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2.1 Consumer Privacy, Confidentiality and Access to Personal Information
2.3 Use and Disclosure
2.4 Privacy and Confidentiality Complaints
2.5 Access and Correction
2.6 Consent
2.7 Authorised representative
2.8 Security and Quality of Information

related resource material

3.6 Sample Form Service Specific Assessment
3.9 Sample Form Advocate or Other Nominated Person – Information Disclosure
3.12 Consumer Information Rights and Responsibilities Statement
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3.15 Consumer Information Welcome to the xx Planned Activity Group
3.16 Consumer Information Welcome to the xx Friendly Visiting Program
2.3 Use and Disclosure

Policy statement

Use refers to handling information within the agency. Disclosure refers to the communication of consumer information to another agency.

We will only use and disclose information for the primary purposes for which it was collected. A consumer will be notified of these purposes at the time of collection and prior to a proposed disclosure. We will take all possible steps to ensure that information is used and disclosed in accordance with a consumer’s expectations.

We will disclose information about a consumer to an outside organisation or individual only if we have the consumer’s, or authorised person’s, consent to do so.

Consent to disclose information will be recorded on the ‘Consumer Consent’ form (SCTT). Consumers will be provided with a copy of this signed form.

If a consumer wishes us to disclose information to an advocate or other nominated person we will require them to complete 3.9 Sample Form Information Disclosure to Advocate or Other Nominated Person.

The only circumstances under which we will disclose consumer information without their consent is when:

- An authorised representative requires information
- Where it is permitted or required by law
- There is a serious threat to the health, safety or welfare of the individual
- There is a serious threat to public health, safety or welfare.

In these situations we will keep the consumer informed of a disclosure of information whenever possible and appropriate.
related policies and procedures

1.3 Referral
1.2 Individual Advocacy
1.10 Communication
1.13 Complaints

2.1 Consumer Privacy, Confidentiality and Access to Personal Information
2.2 Collection
2.4 Privacy and Confidentiality Complaints
2.5 Access and Correction
2.6 Consent
2.7 Authorised representative
2.8 Security and Quality of Information

related resource material

3.6 Sample Form Service Specific Assessment
3.9 Sample Form Advocate or Other Nominated Person – Information Disclosure
3.14 Consumer Information Using an Advocate
2.4 Privacy and Confidentiality

Complaints

policy statement

We recognise and support a consumer’s right to make a complaint if they believe that their personal information has been collected, used or stored inappropriately. Consumers are made aware of how to make a complaint and their right to do so during orientation. (See 1.13 Sample Policy Complaints).
related policies and procedures

1.2 Individual Advocacy
1.13 Complaints

2.1 Consumer Privacy, Confidentiality and Access to Personal Information
2.2 Collection
2.3 Use and Disclosure
2.5 Access and Correction
2.6 Consent
2.7 Authorised representative
2.8 Security and Quality of Information

related resource material

3.9 Sample Form Advocate or Other Nominated Person – Information Disclosure
3.13 Consumer Information Making a Complaint
3.14 Consumer Information Using an Advocate
2.5 Access and Correction policy statement

We recognise that consumers or their authorised representatives have the right to access to their own information and the right to seek its correction.

Consumers will be informed of this right:
- When we seek consumer consent to collect information
- During orientation.

Access

If a consumer, or their authorised representative, wants to access their personal information they will be required to complete a request form (see 3.10 Sample Form Consumer Access to Information). Access will be granted within 45 days.

Where possible, access will be provided in the form requested by consumer. This could be to view documents, receive copies of documents or to have information explained verbally. If a consumer specifically requests a copy of the original record, this will be provided.

We will provide a summary of the information if it is practicable to do so and if we believe this may be helpful to the consumer and if the consumer wants the information in this format.

When access is sought we will provide the individual with an opportunity to discuss their health information. This may prevent the information being misunderstood or taken out of context.

In some circumstances a request for access to information may be denied. These circumstances include when:
- Granting access would pose a serious threat to the life or health of the individual
- The information was given in confidence by another person, unless that other person consents
- This would have an unreasonable impact on the privacy of others
- Denying access is required or authorised by law or where legal privilege applies. Granting access would prejudice law enforcement.
Access will only be denied to those parts of the health record that concern the above circumstances. In circumstances where access is denied a written decision to the consumer, outlining the grounds for any refusal of access, will be provided to the consumer within 45 days.

**Correction**

Individuals seeking access to their information will be advised that they have a right to correct it. If a correction is made the incorrect information will not be deleted from the file. The correct information should be attached to the existing file. A correction may be refused where there is lack of supporting evidence for the correction. If this is the case, the person has the right to request an attachment to their record, stating their correction request and the refusal.

When a correction has been made, the agency will take all reasonable steps to inform other organisations or individuals to whom the information has been disclosed. A consumer who is not satisfied with a decision may complain to the Health Services Commissioner.

Date policy authorised

Person/position responsible for authorisation

Policy review date

Person/position responsible for policy review
related policies and procedures

2.1 Consumer Privacy, Confidentiality and Access to Personal Information
2.2 Collection
2.3 Use and Disclosure
2.4 Privacy and Confidentiality Complaints
2.6 Consent
2.7 Authorised representative
2.8 Security and Quality of Information

related resource material

3.10 Sample Form Consumer Access to Information
2.6 Consent

policy statement

We recognise that consent is valid only when:

- It is informed, voluntary, specific and current
- The consumer has the legal capacity to consent.

Consent is required when we:

- Collect health information
- Use or disclose information for a purpose other than that for which it was collected
- Disclose information to healthcare providers of another agency.

In circumstances where consumers are unable to give informed or voluntary consent an authorised representative may do so on their behalf.

When an authorised representative is required to consent for a consumer, the staff member should ensure that they have sighted and copied for the consumer’s file relevant documentation that provides evidence of authorisation. If there is no authorised representative, and a consumer cannot give informed and voluntary consent, the program coordinator will make a decision about who (eg. carer, friend) if anyone, can consent on the consumer’s behalf and act in the consumer’s best interests.

The program coordinator will keep detailed documentation about the reasons for any decisions made in relation to accepting an unauthorised representative’s ability to consent of the consumer’s behalf.
related policies and procedures

1.3 Referral
1.4 Assessment
1.10 Communication
1.12 Individual Advocacy

2.1 Consumer Privacy, Confidentiality and Access to Personal Information
2.3 Use and Disclosure
2.2 Collection
2.4 Privacy and Confidentiality Complaints
2.5 Access and Correction
2.6 Consent
2.7 Authorised representative
2.8 Security and Quality of Information

related resource material

3.9 Sample Form Advocate or Other Nominated Person – Information Disclosure
2.7 Authorised Representatives

Policy statement

Authorised representatives include:

- Guardians
- Attorneys under enduring powers of attorney
- Agents under the Medical Treatment Act 1998
- Administrators under the Guardianship and Administration Act 1986
- A person otherwise empowered by the consumers to act or make decisions in the best interests of the person.

Proof of the representative authority will be sighted and a copy of that document placed in the consumers file. Proof of authority includes Guardianship or Administration Order or Enduring/Medical Power of Attorney.

If the representative is an advocate or other person nominated by the consumer, a form (see 3.9 Sample Form Advocate or Other Nominated Person-Information Disclosure) will need to be completed that authorises the persons to make decisions to receive information.
related policies and procedures

1.12 Individual Advocacy

2.1 Consumer Privacy, Confidentiality and Access to Personal Information
2.2 Collection
2.3 Use and Disclosure
2.4 Privacy and Confidentiality Complaints
2.5 Access and Correction
2.6 Consent
2.8 Security and Quality of Information

related resource material

3.9 *Sample Form* Advocate or Other Nominated Person – Information Disclosure
2.8 Security and Quality of Information

Policy Statement

Quality of Information

We will ensure that all information is kept accurate, up to date and complete. Consumer Information will be checked for accuracy, currency and comprehensiveness each time a consumer is reassessed.

Use of and access to, information within the organisation

All personal information whether paper or electronic, will be protected from unauthorised access, alteration and loss.

No staff member, volunteer or student is entitled to access any consumer record or file except where such access is in accordance with their professional or administrative role. Staff, volunteers and students will have the minimum level of access to information that their role requires. Staff and Volunteers must keep this information strictly confidential.

The Chief Executive Officer will have access to consumer files for the investigation of complaints and for legal purposes.

Volunteers will only have access to information such as contact and emergency contact details or any other information that is necessary for them to carry out their duties.

Students may have access when involved in a particular case, but only under the supervision of the responsible staff member. Consumers may specify that students not be involved in their case or in any specific consultation.

Staff are obliged to report any breach of consumer confidentiality to their manager. Deliberate breaches of consumer privacy and confidentiality and failure to report such breaches may be considered grounds for dismissal.

All staff, volunteers and students will be required to sign a confidentiality agreement before commencing service. Confidentiality and Privacy policies and procedures will be part of staff and volunteer induction and ongoing training.

No personally identifying information should be contained in any agency publicity material, talks, reports or memos unless prior informed consent has been given by the consumer.
Conversations with or about consumers should be conducted in private.

Records will be kept for seven years after the last contact with the consumer. Consumer records will be disposed of after seven years have elapsed since the last consumer contact.

**Computer security is controlled by:**
- Using access passwords
- Deletion of files held on hard drives, where appropriate
- Storing floppy disks, CDs, and USB devices containing sensitive information in a locked facility.

**Paper record security is controlled by:**
- Keeping consumer files in locked storage when not in use
- Disposing of waste paper containing consumer information by shredding
- Not photocopying papers containing consumer information
- If possible, personal information will not left in an unattached car. If consumer information is carried in a car, it is locked in the boot so that it cannot be seen nor easily accessed by an unauthorised person.
- Cars are locked if unattached.

**Telephone security is controlled by:**
- Not providing consumer information over the telephone or
- By voice mail unless it is established that the caller is authorised to receive such information.

**Email security is controlled by:**
- Mailing consumer information within the agency (except where an established electronic referral procedure is in place).

**Fax:**
- Consumer information is only faxed if it is needed urgently and if the receiver can guarantee the confidentiality of the information. Before faxing the sender:
  - The fax number and identity of the recipient is confirmed
  - Staff will check to ensure an authorised person will be waiting to receive the document as soon as transmission is completed
- After faxing, the sender will ensure that an acknowledgement of receipt is received from the recipient.
Consumer information sent by post or courier is secured by:

- Using registered mail so that delivery acceptance is recorded
- Sealing envelopes and marking them, “Confidential: Attention X”.

Demonstrations or case studies

- Fictitious consumer information is used for training or demonstrations.

related policies and procedures

1.3 Referral
1.4 Assessment
1.12 Individual Advocacy
1.10 Communication

<table>
<thead>
<tr>
<th>Date policy authorised</th>
<th>Person/position responsible for authorisation</th>
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<tbody>
<tr>
<td>Policy review date</td>
<td>Person/position responsible for policy review</td>
</tr>
</tbody>
</table>
related policies and procedures

1.3 Referral
1.4 Assessment
1.6 New consumers
1.11 Rights and Responsibilities
1.12 Advocacy
1.13 Complaints

related resource material

3.9 Sample Forms Advocate or Other Nominated Person – Information Disclosure/Consent to Make Decisions
3.10 Sample Forms Consumer Access to Information
3.13 Consumer Information Making a Complaint
3.14 Consumer Information Using an Advocate
3.15 Consumer Information Welcome to the xx Planned Activity Group
3.16 Consumer Information Welcome to the xx Friendly Visiting Program
Section 3

Supporting Materials:

- Form Letters
- Forms
- Checklists
- Consumer Information
3.1 Ineligible consumers
form letter

Policy guiding the use of this letter: 1.4 Assessment policy

[Letterhead]

[Date]

Dear [X]

Thank you for your interest in our program.

As [I/workers name] explained to you on the [date] that we cannot offer you a place in our program because you do not meet our eligibility criteria. When we conducted an assessment with you on the [date], we assessed you as being ineligible for our program because [your needs are higher than the level of service we can offer you/you don’t live within our catchment area/etc]. I have attached a copy of our eligibility criteria for your information.

You are welcome to reapply in the future if your circumstances change so that you fit within the eligibility criteria. If you do reapply in the future, we will arrange for a new assessment and, if you do fit our eligibility criteria and there are places available in our program, we would be happy to offer you a place in the program.

If you think our decision is unfair or incorrect you are welcome to appeal the decision. I have attached the some information on how to make a complaint so that you know how to do this.

We attempt to treat the people who contact our service, or participate in our programs, with fairness and respect at all times. We also attempt to make the way we do things easy to understand. If you would like to make any suggestions about how we could do this better, please contact us and share your ideas with us. You can contact me on (phone number).

Please contact us if you wish to discuss this letter or you would like us to refer you to another service.

Yours sincerely,
3.2 Offer of service form letter

Policy guiding the use of this letter: 1.4 Assessment policy

[Letterhead]

[Date]

Dear [X]

We would like to offer you a place in our program. As we explained to you on the [date], if you decide to take up this offer we would like you to attend an orientation interview on the [date/venue/time].

At the orientation interview we will introduce you to [the staff and other participants/volunteer who has been matched with you] and give you some important information on the service.

You are welcome to bring a family member, friend or carer to this interview.

I have attached some information about our program. We will go through this information on the day and we will explain each section to you and answer any questions you might have.

If you cant make the interview please contact us and let me know.

Sincerely,
3.3 Consumer refusal of offer
form letter

Policy guiding the use of this letter: 1.4 Assessment policy

[Letterhead]

[Date]

Dear [X]

Thank you for your interest in our service.

You have recently informed us that you do not wish to take up a place [in our service/ a place on our waiting list].

Your decision not to take up a place [in our service/ a place on our waiting list] will not disadvantage you if you wish to apply in the future. If you do apply in the future, we will arrange for a new assessment and, if you fit our eligibility criteria and there are places available in our program, we will be happy to offer you a place in the program.

We attempt to treat the people who contact our service or participate in our programs with fairness and respect at all times. We also attempt to make the way we do things easy to understand. If you would like to make any suggestions about how we could do this better please contact us and share your ideas with us. You can contact me on [phone number]. Your ideas will help us to provide a better service in the future.

Sincerely,
3.4  Consumer initiated discharge form letter

Policy guiding the use of this letter: 1.8 Discharge policy

[Letterhead]

[Date]

Dear [X]

Recently you informed us that you no longer wish to participate in our program.

As of the [date] we will cease services to you. If you change your mind and wish to participate in our program once again, you are welcome to reapply. If you do reapply in the future, we will arrange for a new assessment and, if you still fit our eligibility criteria and there are places available, we would be happy to offer you a place in the program. Your decision to leave the program will not disadvantage you if you wish to apply again for services.

In order to improve our services in the future we would like to interview you about your experiences as a consumer of our services as well as your opinions about how we could do things better. We would greatly appreciate it if you shared your ideas and experiences with us. The program coordinator will contact you about this interview. While we would greatly value your feedback, we will respect your decision if you choose not to participate in this interview.

Sincerely,
3.5 Organisation initiated discharge form letter

Policy guiding the use of this letter: 1.8 Discharge policy

[Letterhead]

[Date]

Dear [X]

Unfortunately, as of the [date] you will no longer be able to participate in our program. This is because you [fill in details]

We would be happy to refer you to another service if you wish us to do so. A staff member will contact you to discuss this with you. When we contact you we will also ask you if you would be willing to talk with us about your experiences as a consumer of our services and your opinions about how we could do things better. We would greatly appreciate it if you share your ideas as well as your negative and positive experiences with us as this will help us make our services better for future consumers. While we would greatly appreciate your feedback, if you don’t want to share your ideas and experiences with us we will respect your decision.

If you think our decision to end your participation in our program is unfair or incorrect you are welcome to appeal the decision. I have attached the some information on how to make a complaint so that you know how to do this.

You are welcome to apply for services again in the future if your circumstances change so that you [once again fit within our eligibility criteria/are able to attend more regularly]. If you do reapply in the future, we will arrange for a new assessment and, if you still fit our eligibility criteria and there are places available, we would be happy to offer you a place in the program. Your previous participation in the service will not disadvantage you if you wish to apply again.

Yours sincerely,
3.6 Service Specific Assessment Form

sample form

Policy guiding the use of this form: 1.4 Assessment Policy

Consumer Name: ________________________________________________

Assessment Date: _____ / _____ / _____

Health Conditions:

_________________________________________________________________
_________________________________________________________________
_________________________________________________________________
_________________________________________________________________

Dietary Requirements:
☐ Diabetic ☐ Low fat/salt ☐ Soft

Other: __________________________________________________________

Communication:

Preferred spoken language? ______________________________________

Preferred language for reading written materials? _____________________

Difficulty with written materials?
☐ N/A ☐ Illiterate ☐ Visual impairment

☐ Other: _________________________________________________________

What actions can the organisation take to assist the consumer to access written materials? ________________________________

_________________________________________________________________

Continued next page
Interests:

________________________________________

________________________________________

________________________________________

Reasons for wanting to participate in the program:

________________________________________

________________________________________

________________________________________

Transport requirements:

________________________________________

________________________________________

________________________________________

Getting in/out of car:
Can do: ☐ Alone ☐ with aids ☐ with help ☐ cannot do

Getting in/out of bus:
Can do: ☐ Alone ☐ with aids ☐ with help ☐ cannot do

Volunteer Preferences (Friendly Visiting only):
Age: ______________

Gender: ____________________

Language: ____________________

Other: __________________________________

Suitable times for visits: __________________________________
Details of Volunteer matched with the consumer

Fees (PAG only)
☐ Daily fee: Amount $_______ Subsidised $_______

Which PAG will the consumer attend?

Advocacy:
Does the consumer wish to use an advocate when dealing with our organisation? Yes/No
Advocate Name: _____________________________________________
Contact Details: _____________________________________________

In relation to which matters would the consumer like to use an advocate?

Relationship of advocate to consumer (eg. carer, friend, advocacy organisations)

Does the consumer wish the organisation to share information with their advocate when the consumer is not present? Yes/No

If yes, complete an 3.9 Advocate or Other Nominated Person-Information Disclosure
Does the consumer wish the Advocate to make decisions on their behalf? Yes/No

If yes, complete an 3.9 Advocate or Other Nominated Person-Information Disclosure

Continued next page
## Reassessment:

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<tr>
<td>Reminded of Rights and Responsibilities</td>
<td>Reminded of Rights and Responsibilities</td>
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<td>Reminded of Rights in relation to privacy and confidentiality</td>
<td>Reminded of Rights in relation to privacy and confidentiality</td>
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<tr>
<td>Reminded of How to Make a Complaint/ Use an Advocate</td>
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</table>
### 3.7 Waiting list sample form

*Policy guiding the use of this form: [1.5 Waiting list policy]*

<table>
<thead>
<tr>
<th>Name</th>
<th>Date stated commenced on waiting list</th>
<th>Dates contacted while on waiting list</th>
<th>Date reassessed</th>
<th>Date exited waiting list</th>
<th>Reason for exiting waiting list</th>
<th>Priority ranking</th>
<th>Which HACC special needs group does the consumer belong to</th>
</tr>
</thead>
<tbody>
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### 3.8 Complaint Form

**sample form**

*Policy guiding the use of this form: [1.13 Complaints](#) and [1.12 Individual Advocacy](#)*

*(To be filled out by staff member receiving complaint)*

Name of consumer making the complaint: 

Name of person filling out this form: 

Date complaint received: 

*Attach any written communication relating to this complaint. This form should be kept in the complaints register.*

<table>
<thead>
<tr>
<th>Does the consumer wish to use an advocate in relation to this matter?</th>
<th>Yes/No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advocate Name and Contact Details:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship of Advocate to consumer (eg. carer, friend, advocacy organisations):</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Has the consumer signed an Advocate Information Disclosure Form in relation to this matter?</td>
<td>Yes/No</td>
</tr>
<tr>
<td>Details:</td>
<td></td>
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<tr>
<td></td>
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<tr>
<td>Details of Complaint - From Complainant’s Perspective:</td>
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</tbody>
</table>
What would the complainant like to happen?

______________________________
______________________________

Was the consumer given copy of ‘Making a Complaint’/ ‘Using an Advocate’ when they made their complaint?

☐ Yes

☐ No   Why Not? ________________________________

Level of Complaint?:

☐ Routine: Attempt to resolve the complaint with the consumer

☐ Serious: Refer to program coordinator within 24 hours noting:
  o Date and time complaint referred to program coordinator _________________
  o Person now handling complaint _________________________________
  o Date complaint acknowledged in writing (attach letter) _______________

Actions Taken/ Decisions made:

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

Outcome:

☐ Date consumer was informed of the organisations actions and decisions in relation to this complaint: __

☐ Was the consumer informed:
  o verbally (routine complaints)? or
  o in writing (serious complaints)?
Details of any further action:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
3.9 Advocate or Other Nominated Person-Information Disclosure

taboe form

**Policies guiding the use of this form:** 1.12 Individual Advocacy & 2.1 Privacy, Confidentiality and Access to Information.

Date: _____ / _____ / _____

I [consumer’s name]__________________________________________

give [organisation name]______________________________________

permission to share the following information____________________

with [advocate or nominated person name/contact details] ________________

I understand that I can change my advocate/nominated person or stop using an advocate/nominated person at any time.

I understand that I can use an advocate/nominated person without giving the organisation consent to share information about me with the advocate/nominated person.

I understand that I can withdraw my permission, at any time, for the organisation to share information with my advocate/nominated person. I understand that I can do this by informing the organisation and changing this form.

Consumer’s signature: ________________________________

Date: _______________
### 3.10 Consumer Access to Information

#### sample form

**Policies guiding the use of this form:** 2.5 Access and Correction

<table>
<thead>
<tr>
<th>Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Details:</td>
<td></td>
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</tbody>
</table>

**What information do you want access to:**

|  |  |
|  |  |
|  |  |

**Is the information requested your personal information or are you a representative of this person?** (proof of authorisation must be sighted and copied)

|  |  |
|  |  |
|  |  |

**Would you prefer to:**

- [ ] Have this information photocopied and sent to you
- [ ] Pick up a copy of the information at our offices
- [ ] Have the information verbally explained to you by a staff member.

Signature __________________________ Signature __________________________
3.11 Waiting List
consumer information

Policy guiding the use of this information: 1.5 Waiting list policy

Sometimes a higher number of people want to participate in our programs than we have places for. When this happens we put people on a waiting list.

Unfortunately if you have been placed on a waiting list we cannot tell you exactly how long you will have to wait before you can participate in our program. However we will make every effort to find a place for you in the program as quickly as possible.

While you are on the waiting list we will contact you every (specify) weeks/months to see if you are still interested in our program and wish to stay on the waiting list. If you are on the waiting list for longer than (specify) weeks/months we will organise to reassess you. We reassess you so that we can see whether your needs and personal details have changed. We also reassess you to check whether you are still eligible for the program.

When a place becomes available in the program we will give this place to the person on the waiting list who needs it the most. This means taking into account a range of circumstances like economic circumstances, social isolation, health status and social disadvantage. This means that we do not always prioritise the person who has been waiting the longest, although we do take the amount of time people have been waiting into account.

If you would like to know more about how the waiting list process works please contact us and we will be happy to explain it to you in more detail.

While you are on the waiting list if you unhappy about the decisions we make or any other matter please tell us. We encourage you to share with us any ideas you have for how we could make our service better. We also encourage you to make a complaint if you feel our decisions have been unfair or incorrect or if you are unhappy about any other matter. We have attached some information about how to make a complaint if you need to. We have also attached some information on how to use an advocate.
3.12 Consumer Rights and Responsibilities

Statement

Policy guiding the use of this information: 1.11 Rights and Responsibilities

Consumer Rights
HACC consumers’ key rights within the HACC program are:

- The right to respect for their individual human worth and dignity.
- The right to be treated with courtesy.
- The right to be assessed for access to services without discrimination.
- The right to be informed and consulted about available services and other relevant matters.
- The right to be part of decisions made about their care.
- The right to choose from available alternatives.
- The right to pursue any complaint about service provision without retribution.
- The right to involve an advocate of their choice.
- The right to receive good quality services.
- The right to privacy and confidentiality, and access to all personal information kept about the consumer.

Consumer responsibilities
Consistent with their status as members of Australian Society, consumers of HACC services have a responsibility:

- To respect human worth and dignity of the service provider staff and other consumers.
- To treat service provider staff and other consumers with courtesy.
- For the results of any decisions they make.
- To play their part in helping the service provider to provide them with services.
3.13 Making a Complaint

consumer information

Policy guiding the use of this information: 1.13 Consumer Complaints

We encourage you to make a complaint if you don’t like the way we do things or if you disagree with a decision we have made. Our organisation welcomes complaints because complaints help us make our service better for you and for other people. It is very important to our organisation that we make our services the best they can be.

We take all complaints seriously and we do our best to resolve them. Each complaint will be dealt with promptly and fairly and without retribution. ‘Without retribution’ means you will not lose services or be treated negatively because you make a complaint.

If you want to make a complaint you can do it yourself or you can get someone else (like a family member, a friend or someone from another organisation) to help you. We call someone who helps you make a complaint, or negotiates on your behalf, an advocate. Information on using an advocate is attached to this brochure.

We will keep your complaint confidential. Only staff within our organisation will know about your complaint. We will only tell other people about your complaint if we have your permission to do so. The only time we will tell anyone about your complaint without your permission is when we think that someone is at risk of serious harm or if we think a criminal offence has occurred. However, this kind of situation is very unusual.

If you want to make a complaint please follow the steps below:

1. Tell a staff member about your complaint. Depending on the type of complaint, the staff member will try and resolve the complaint with you or they will get the program coordinator to resolve the complaint with you. We will let you know within 5-10 working days (depending on the type of complaint you make) any actions we have taken or intend to take to resolve your complaint.

If the complaint has not been resolved to your satisfaction go to step 2

2. Raise the complaint with the coordinator of the planned activity group or friendly visiting program. The coordinator is (name) and they can be contacted on (number).

The program coordinator will let you know within 5-10 working days (depending on the type of complaint you make) any actions we have taken or intend to take to resolve your complaint.
If the complaint has not been resolved to your satisfaction go to step 3

3. Raise the complaint with a member of the management committee. The management committee member you can contact is (name) and they can be reached on (number). The management committee will attempt to resolve your complaint as soon as possible. However the management committee meets only every x weeks so they may take up to x weeks to deal with your complaint.

4. If you have contacted all of the above people and the complaint is still not resolved to your satisfaction you can contact the following outside organisations who may help you resolve your complaint.

Department of Human Services
North-West Region
- Fitzroy 145 Smith St 3065
  1300 360 408
- TTY
  (03) 9412 2647
- Footscray 71 Moreland St 3011
  1300 360 462
- Preston 697 High St 3072
  1300 664 977

The Department of Human Services funds our organisation. The Department of Human Services may be able to provide some assistance to you in resolving a complaint that you think our organisation has not resolved to your satisfaction.

Office of the Public Advocate
221 Drummond St
Carlton 3053
Phone: 9660 1444
The Office of the Public Advocate represents the interests of Victorians with a disability. The Office of the Public Advocate can provide individual advocacy.

The Health Services Commissioner
10th Floor
55 Swanson St
Melbourne 3000
Phone: 9655 5200
The Health Services Commissioner deals with complaints concerning any private or public health service provider.
The Equal Opportunity Commission
Level 3/ 380 Lonsdale St  Melbourne  3000
(03) 9281 7111
TTY
(03) 9281 7110
Deals with complaints concerning discrimination on the grounds of disability, sex, race, age, industrial activity, marital, parental or carer status, political or religious beliefs, sexual orientation or pregnancy
3.14 Using an advocate

Policy guiding the use of this information: 1.12 Individual Advocacy

An advocate is someone who can support you to:

- make decisions for yourself
- make your voice heard
- stand up for your rights
- protect and promote your interests

An advocate can be a family member, friend or organisation.

People often use an advocate in a situation where they feel confused, overwhelmed, intimidated or under-confident. Sometimes people use advocates to speak on their behalf or support them to speak for themselves.

We encourage you to use an advocate when dealing with our organisation if you feel confused, overwhelmed, intimidated, under-confident or if you think an advocate would be useful. For example, you could use an advocate if you want to make a complaint or when you are assessed for services.

You can choose your own advocate or we can assist you (wherever possible) to find one. You can change your advocate, or stop using an advocate, at any time.

We will not share information with your advocate if we do not have your permission to do so. If you want us to share information with your advocate when you are not present you must give us written permission by completing a form. If you want to stop using your advocate or if you want to change your advocate please let us know so we can change the details on the advocate nomination form.

Organisations who can assist you with advocacy or provide you with an advocate are listed on back of this page.
Organisations who can assist you with advocacy or provide you with an advocate:

**ADEC (Action on Disabilities in Ethnic Communities)**
13 Munro St
Coburg 3058
Phone: 9383 5566
Toll Free: 1800 626 078
*Supports people from a Non English Speaking Background with a disability and their carers. Can provide advocacy services.*

**Office of the Public Advocate**
221 Drummond St
Carlton 3053
Phone: 9660 1444
*The Office of the Public Advocate represents the interests of Victorians with a disability. The Office of the Public Advocate can provide individual advocacy.*
3.15 Welcome to the xx Planned Activity Group

consumer information

Policy guiding the use of this information: 1.6 New Consumers

Here is some basic information you need to know about the group and our organisation. You can discuss any questions you have when we meet for your orientation session or you can call us at any time.

Venue and Time
We meet at xx from xx.

Transport
We offer transport (a minibus or taxi) to and from the centre. Please be ready for pick up no later than xx. You will be taken back home between xx and xx.

Fees
We charge a fee of xx per session. We are able to reduce or waive the fee if you have trouble paying. This fee contributes to transport and food.

Meals and Dietary Requirements
When you come to the group we provide you with lunch as well as morning and afternoon tea. We are happy to cater for most dietary requirements so please let us know if you have particular dietary needs (for example, you may need meals suitable for diabetics or there are cultural or religious rules about what you eat).

Holidays and Closures
The group will not run on the following public holidays; xx. We will remind you of these holidays at least a month before they occur.

Staff
The names of the staff who work with your group are: xx, xx.
We also have a staff member who coordinates the program. This person’s name is xx.

Absences
If you can’t come to the planned activity group on a particular day please contact us and let us know. We would appreciate as much notice as possible. Even if you are unable to attend at short notice it is still important to let us know that you aren’t coming so that we don’t initiate our emergency procedure. We initiate our emergency procedure if you don’t come to the group and we can’t contact you. Our emergency procedure involves contacting your next of kin or doctor, if we still can’t find you, we may contact the police. We do this in case you have become ill and are unable to get help.

If we have arranged for you to be transported to the venue we need a minimum of 24 hours notice that you aren’t coming to the group. This notice is required so we can cancel your transport arrangements without our organisation having to incur any costs. If we have arranged transport for you and you don’t let us know that you aren’t coming we
may charge you for any transport costs we incur.

**Medication**

We are unable to administer medication to you because Department of Human Services guidelines state that only qualified health professionals can administer medication. We encourage people to take full responsibility for their own medication. However, we can assist you to take your medication if you need us to. An example of the type of assistance we can give you is to remind you to take your medication or unscrew the medication container for you. If you need to take medication while attending the group bring it with you, in its original container clearly marked with your name, and give it to the worker when you arrive. We will store the medication in a safe place and you can get it from us when you need to take it. Please see our medication policy for more details.

**Withdrawing from the program**

You can choose to withdraw from the program whenever you wish. Please let us know if you wish to withdraw from the program. If you choose to leave the program you can always apply to return in the future. If you apply in the future, you will be reassessed and, if you are still eligible and there is a place available, you will be able to return to the program. We welcome past participants to reapply for the program.

Unfortunately, sometimes we have to ask someone to leave the program. This is usually when they no longer meet our eligibility criteria. For example, a person might move to an area that our program doesn’t cover or. Sometimes a person’s needs have become too great for the level of service we offer. An example of this is when a person becomes very sick or frail and our staff are unable to give the person the kind of care that they need.

If we make a decision that you no longer fit within our eligibility criteria and you disagree with this decision you are welcome to appeal the decision.

**Feedback**

We aim to:

- treat the people who contact our service or participate in our programs with fairness and respect at all times
- make our processes transparent and easy to understand
- run high quality programs that are stimulating, well organised and people centred.

If you would like to make any suggestions about how we could do any of these things better please share your ideas with us. Your ideas are important to us because we want our service to be the best it can be.

Occasionally we will give the members of our planned activity group a survey or have a discussion with the group about any ideas our participants have for making our program better. We do this x times a year

**Rights and Responsibilities**

People using our service have some very important rights and responsibilities. You can find out more about these by reading the rights and responsibilities statement attached. We will also explain these to you when we meet you for your orientation session.
Privacy, Confidentiality and Access to Information
We respect your right to privacy and confidentiality. We will only collect information from you that we need in order to give you services.

Your information will only be seen by staff members employed by organisation. We also give some information about the people who use our services to our funding body, the Department of Human Services. This information is given to the Department of Human Services without your name and address so you can’t be identified.

We will not pass on your information to another organisation without your permission. An example of when you might want us to pass on your information to another organisation is if you want us to refer you to another service, like, for example, a health service.

The only time we will pass on your information without your permission is if we are required to by law or if there is a serious threat to your safety or someone else’s safety. This happens very rarely.

If you want someone else to have access to your information, like an advocate or a family member, a form will be provided that will help you make this request.

You have a right to see any information we collect about you. If you want to access your information please tell us and we will ask you to make this request to us in writing. We will provide you with a form to do this with. You can see your files within 45 days of making a request to us in writing.

If you don’t think we have respected your privacy and confidentiality please tell us by making a complaint.
3.16 Welcome to the xx Friendly Visiting Program

consumer information

Policy guiding the use of this information: 1.6 New Consumers

Here is some basic information you need to know about the group and our organisation. You can discuss any questions you have when we meet for your orientation session or you can call us at any time.

Staff/Volunteers
The name of the volunteer who will be visiting you is (name)
The name of the staff member who coordinates the volunteer program is (name) and they can be contacted on (phone number)

Volunteer Role
The volunteer who visits you is able to do a range of activities with you, for example xx. There are some things our volunteers are not allowed to do such as handle your money (for example paying bills for you) or give you advice on legal, financial, medical or personal matters. If you would like advice on these matters you can contact the Volunteer Coordinator and they will try to find a professional to assist you.

Fees
There is no fee for this service.

Holidays and Closures
Our offices will be closed and our volunteers may not visit on the following public holidays; xx. We will remind you of these holidays at least a month before they occur.

Absences
If you are unable to keep your appointment with your volunteer please let us know. We would appreciate as much notice as possible. Even if you are unable to keep your appointment at short notice it is still important to let us know that you are unable to attend your appointment so that we don’t initiate our emergency procedure. We initiate our emergency procedure if you are not home and we can’t contact you. Our emergency procedure involves contacting your next of kin or doctor, if we still can’t find you, we may contact the police. We do this in case you have become ill and are unable to get help.

Medication
Our volunteers or staff are unable to administer medication to you because Department of Human Services guidelines state that only qualified health professionals can administer medication. We encourage people to take full responsibility for their own medication.

Withdrawing from the program
You can choose to withdraw from the program whenever you wish. Please let us know if you wish to withdraw from the program. If you choose to leave the program you can always apply to return in the future. If you apply in the future, you will be reassessed and, if you are still eligible and there is a place available,
you will be able to return to the program. We welcome past participants to reapply for the program.

Unfortunately, sometimes we have to ask someone to leave the program. This is usually when they no longer meet our eligibility criteria. For example, a person might move to an area that our program doesn’t cover or. Sometimes a person’s needs have become too great for the level of service we offer. An example of this is when a person becomes very sick or frail and our staff are unable to give the person the kind of care that they need.

If we make a decision that you no longer fit within our eligibility criteria and you disagree with this decision you are welcome to appeal the decision.

Feedback
We aim to:
- treat the people who contact our service or participate in our programs with fairness and respect at all times
- make our processes transparent and easy to understand
- run high quality programs that are stimulating, well organised and people centred.

If you would like to make any suggestions about how we could do any of these things better please share your ideas with us. Your ideas are important to us because we want our service to be the best it can be.

Occasionally we will ask people, through a written survey, who participate in our Friendly Visiting Program about any ideas they have for making our program better. We do this xx times a year.

Rights and Responsibilities
People using our service have some very important rights and responsibilities. You can find out more about these by reading the rights and responsibilities statement attached. We will also explain these to you when we meet you for your orientation session.

Privacy, Confidentiality and Access to Information
We respect your right to privacy and confidentiality. We will only collect information from you that we need in order to give you services.

Your information will only be seen by staff members employed by our organisation. We also give some information about the people who use our services to our funding body, the Department of Human Services. This information is given to the Department of Human Services without your name and address so you can’t be identified.

We will not pass on your information to another organisation without your permission. An example of when you might want us to pass on your information to another organisation is if you want us to refer you to another service, like, for example, a health service.

The only time we will pass on your information without your permission is if we are required to by law or if there is a serious threat to your safety or someone’s else’s safety. This happens very rarely.

If you want someone else to have access to your information, like an advocate or a
family member, a form will be provided that will help you make this request.

You have a right to see any information we collect about you. If you want to access your information please tell us and we will ask you to make this request to us in writing. We will provide you with a form to do this with. You can see your files within 45 days of making a request to us in writing.

If you don’t think we have respected your privacy and confidentiality please tell us by making a complaint.
3.17 New Consumer Orientation Kit (PAG and Friendly Visiting)

checklist

Policy guiding the use of this checklist: 1.6 New Consumers

☐ Welcome to the PAG/FV Consumer Information Sheet
☐ Rights and Responsibilities Statement
☐ Making a Complaint Consumer Information Sheet
☐ Using an Advocate Consumer Information Sheet
☐ Organisational Chart
☐ Newsletter
☐ ‘Your Information. It’s private’ Brochure
3.18 Orientation Session Checklist (Planned Activity Group)

checklist

Policy guiding the use of this checklist: 1.6 New Consumers

☐ Introduce the consumer to staff and other group members

☐ Explain the daily routine of a PAG session

☐ Explain the layout of the centre including emergency exits and procedures

☐ Ensure the consumer has a copy of, and has read, the consumer orientation kit

☐ Explain the contents of the consumer orientation kit

☐ Answer consumers concerns or questions
3.19 Orientation Session Checklist (Friendly Visiting)

checklist

Policy guiding the use of this checklist: 1.6 New Consumers

☐ Introduce the consumer to the volunteer

☐ Ensure the consumer has a copy of, and has read, the consumer orientation kit

☐ Explain the contents of the consumer orientation kit and answer consumers concerns or questions

☐ Ensure that both the consumer and the volunteer understand the boundaries and limits to the volunteer’s role.