

CLIENT INTAKE FORM

Client Details

Surname: _____

Given Name: _____

Preferred Name: _____

Date of Birth: _____

Gender: _____

Address: _____

Phone: _____

Email: _____

Cultural Identity (Optional):

Please describe any cultural, ethnic, religious, or community identity that is important to you and that you would like us to consider when providing support.

Service Type Required

- ☐ Counselling / Capacity Building
- ☐ Focused Social Support Life Story
- ☐ Social Support
- ☐ Daily Life Support
- ☐ Transport / Community Access

General Social Support, Domestic Assistance and Community Access:

From \$80 per hour, plus \$1.00 per kilometre for travel during the visit. A minimum booking of 1 hour applies.

Counselling or Focused Social Support Life Story Sessions:

\$90 per hour. Support is delivered as a package of 6 consecutive 1-hour sessions.

Funding

☐ Private Client

☐ NDIS Self-Managed

☐ Agency or Organisation

Provider / Organisation Name: _____

Contact Person: _____

Contact Person Phone: _____

Incident Report Phone: _____

Contact Email: _____

Incident Report Email: _____

Accounts / Billing Email: _____

NDIS Participant Number (if applicable): _____

Service Delivery Preference

☐ Client Home

☐ Community Location : _____

☐ Online / Phone

Preferred Days and Times

Services are generally available **Monday to Friday, 8:00am – 5:00pm.**

Specific DATE: _____

Specific TIME: _____

Preferred Day(s):

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Service Frequency

Please indicate the preferred frequency of service:

Home Environment & Safety

Are there any pets at the property?

☐ Yes ☐ No Pet Type/s: _____

☐ I understand that pets must remain under my control and/or be appropriately restrained during service visits to ensure the safety and wellbeing of all persons present.

Are there any mobility, access or safety considerations we should be aware of? Please specify:

Additional Information / Comments

Our Approach & Workforce

We primarily use a strengths-based, client-centred approach across all services.

At times, support services may be provided by another approved qualified worker.

All workers meet relevant Working With Children, Aged Care and NDIS requirements.

Code of Conduct Policy is available at [SocialSupportandCounselling.au](https://socialsupportandcounselling.au)

Confidentiality, Privacy & Service Environment

Counselling and Focused Social Support services require a private and appropriate space to support confidentiality and effective service delivery. In person sessions and supports are provided within the clients home or nominated community location. If unplanned visitors attend during a scheduled service, the appointment may need to end early and may require rebooking.

Your privacy and trust are incredibly important to us. Everything you share with our care team is kept strictly confidential. However, to ensure your safety and comply with the law there are a few rare situations where we are required by Australian law to share information with relevant authorities. These exceptions are:

- **Protecting Your Safety:** If we believe there is a serious risk of harm to you or another person.

- **Mandatory Reporting:** To meet our legal obligations regarding child safety or reportable incidents under the [Serious Incident Response Scheme \(SIRS\)](#).
- **Legal Orders:** If we receive a formal court order, subpoena, or other official legal requirement.

All session notes and client records are securely stored in password-protected electronic files and or locked filing cabinets. Adult client records are retained for a period of seven (7) years from the date of the last client contact in accordance with record-keeping requirements. Privacy and Confidentiality Policy is available at [SocialSupportandCounselling.au](#)

Cancelling Sessions

A minimum of 24 hours' notice is required for all cancellations or changes to scheduled services where possible. Clients are asked to cancel services if they are unwell or experiencing any contagious symptoms including: Vomiting or diarrhoea Cold or flu symptoms Fever or contagious illness Please also provide notice if: You are expecting visitors during scheduled service times, You do not require services on a public holiday, You will not be home or available for support Cancellations can be made by: Calling or texting: 0484 547 048 Email: charmayne.payne@bigpond.com Where less than 24 hours' notice is provided, scheduled service charges may still apply unless due to an emergency or exceptional circumstance. If the worker is required to cancel a service, as much notice as possible will be provided and an alternative time may be offered where available.

Changing or adding sessions

Clients may request to change or add sessions with a minimum of 24 hours' notice, subject to availability. All changes or additional supports must be discussed and agreed upon by both parties prior to the service being provided. Requests can be made by: Calling or texting: 0484 547 048 Email: charmayne.payne@bigpond.com

Minimum hours, finishing early and overtime

A minimum booking of 1 hour applies to all services. All booked session times will be charged, including where a session finishes early at the client's request. The worker will only leave prior to the scheduled finish time if requested by the client. Where there is remaining booked time available within a session, this time may be utilised to continue providing support through: Social support and companionship - Conversation and emotional support Domestic assistance - assistance with daily tasks or community engagement. Where support extends beyond the scheduled booking due to client requests, exceptional circumstances, late-running appointments or mandatory reporting requirements, additional time will be charged at the agreed hourly service rate. Any extension of service is subject to worker availability.

Feedback, complaints or disputes

Clients have the right to provide feedback, raise concerns, or make a complaint without fear of discrimination or loss of services. All complaints will be taken seriously and managed respectfully, confidentially, and in line with Aged Care Standards, NDIS Practice Standards, and Child Safe principles. Where possible, complaints should first be discussed directly with the service provider so concerns can be resolved promptly and fairly. Complaints can be made by: Phone: 0484 547 048 or Email: charmayne.payne@bigpond.com Clients may also request a copy of the full Complaint and Incident Management Policy & Procedure at any time and can be accessed at [SocialSupportandCounselling.au](#) . All complaints and incidents

will be documented, reviewed and responded to within a reasonable timeframe, with appropriate actions taken to support client safety, wellbeing, and service improvement.

Client Consent

I acknowledge that I have read and understood the information contained within this intake form and consent to receiving services from Social Support and Counselling.

Client / Representative Name: _____

Signature: _____

Date: _____

OFFICE USE ONLY

Booking Type: _____

Approved Service(s): _____

Scheduled Day(s): _____

Scheduled Time(s): _____

Additional Details:

☐ Approved

☐ More Information Required

Details of Additional Information Required:

Staff Member Name: _____

Signature: _____

Date: ____ / ____ / ____