SERVICE ACCESS AND INTAKE POLICY AND PROCEDURE

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Purpose and Scope

This policy and procedure sets out Bilingual Care's service access and intake procedures. These procedures uphold the rights of consumers to access appropriate services that meet their needs and that are provided in a transparent and equitable way.

Decisions regarding service access, intake and prioritisation are based on a combination of:

- consumer eligibility and approval status
- the consumer's assessed needs and urgency of support
- availability of funded services and Bilingual Care's capacity
- the consumer's preferences and goals, and
- the impact on continuity, safety and wellbeing of existing consumers.

The policy and procedure applies to all staff, potential and existing consumers, their family members, carers, and other supporters, and meets relevant legislation, regulations and Standards.

Applicable Strengthened Aged Care Quality Standards

- *Standard 1. The Individual*
- *Standard 3. The Care and Services*
- *Standard 4. The Environment*
- *Standard 5. Clinical Care*

Definitions

Appointed Decision Makers - representatives who are formally and legally appointed to make decisions for a person who requires decision-making support.

They apply to the third level of decision making, within a decision-making framework. The framework levels are:

1. ***Independent*** – a person is capable of making a decision for themself
2. ***Supported*** - a person needs support to exercise their legal decision-making rights (also called legal capacity). This level supports a person to make valid decisions as opposed to solely making decisions on their behalf and can include an **advocate** or **registered supporter**.
3. ***Substitute*** - where other people make decisions on behalf of a person who requires decision-making support. An appointed decision maker may include a person appointed as a guardian, enduring attorney, administrator, or similar role, and may have authority to make decisions about personal, health, lifestyle, or financial matters, depending on the scope of their legal appointment.

An appointed decision maker can only make decisions on the consumer's behalf in line with

their active, legal authority. If a person is an appointed decision-maker under a commonwealth, state or territory arrangement, the consumer does not also need to register them as a **Registered Supporter**.

My Aged Care - a telephone line and website provided by the Australian Government to assist consumers and their families and carers to access information, resources, and support related to aged care services. This includes information about eligibility assessments, referrals and connecting to services. My Aged Care also has a secure online system called the *My Aged Care Service and Support Portal* that can only be accessed by government-approved aged care service providers to manage service information, referrals and consumer records.

Funded Aged Care Services - services that are subsidised by the Australian Government under the Support at Home program, including clinical, independence, and everyday living supports. Funded Supports fall into 3 ongoing categories:

- ***Clinical Supports*** - Services such as nursing care and allied health therapies that are fully funded by the government and typically do not require an individual contribution.
- ***Independence Supports*** - Services that help maintain a person's independence, such as personal care and assistive technology. These may require a financial contribution based on the person's Individual Contribution Rate.
- ***Everyday Living Supports*** - Services that assist with daily activities, such as domestic assistance and meal preparation. These typically require a higher Individual Contribution.

Referral – the way in which a provider is contacted to request services for a consumer. There are 4 referral pathways:

- consumers with existing approvals for care types under the *Aged Care Act 2024 (Cth)* can approach service providers directly (they may or may not be registered with My Aged Care).
- providers can receive electronic referrals for service via the *My Aged Care Service and Support Portal*
- consumers may approach providers directly with a referral code issued by assessors or the My Aged Care contact centre, or
- providers can accept electronic referrals to their waitlist, if a waitlist is available.

Registered Supporter[1] - a person formally authorised by a consumer through My Aged Care to support them to access, understand, manage, and communicate about their Support at Home services. A Registered Supporter can help with information sharing, decision-making, and interactions with service providers and government systems, within the level of authority granted by the consumer.

A Registered Supporter does not have decision-making authority for the consumer, and does not replace the older person's right to make their own decisions. They must act in accordance with the older person's wishes, best interests, and rights at all times.

A family member, carer and other significant person in the consumer's life does not have to become a Registered Supporter but can still support the consumer.

If a person holds guardianship, enduring power of attorney or similar legal authority, these people are **appointed decision makers** and can make decisions the consumer's behalf in accordance with commonwealth, state or territory laws.

[1] Department of Health and Aged Care (2025) *Registered supporters*. Australian Government. Accessed 24 March 2026, https://www.health.gov.au/our-work/aged-care-act/about/registered-supporters?language=en

Service List - a defined list of services outlining included and excluded services available to consumers under the Support at Home program.

- ***In-Scope Services*** – services that are eligible for government funding under the Support at Home program, as listed in the *Aged Care Rules 2025*.
- ***Out of Scope Services*** – services that are not eligible (excluded) from funding under the Support at Home program, as listed in the *Aged Care Rules 2025*.

Policy

Bilingual Care ensures that initial intake and priority of access is undertaken in a fair, equitable and transparent manner, and in line with the *Aged Care Code of Conduct* and *Statement of Rights.* Consumers may access services through My Aged Care referral pathways or by contacting Bilingual Care directly, as appropriate.

Bilingual Care provides a service delivery environment that is safe, inclusive, welcoming, and accessible, and responsive to the diverse needs, preferences, communication requirements, and cultural backgrounds of all consumers.

Bilingual Care supports equitable access by ensuring that no person is discriminated against and that reasonable adjustments are made to encourage participation and inclusion.

Procedures

General Support to Access Services

The Managing Director is responsible for ensuring staff are familiar with the requirements of this policy and have sufficient skills, knowledge, and ability to meet the requirements.

The Managing Director reports to the Leadership Team on the effectiveness of Bilingual Care's access and entry processes. This is discussed at Leadership Team meetings to identify any areas for improvement.

Consumer feedback and complaints in relation to access and intake will be addressed in accordance with Bilingual Care's *Feedback and Complaints Policy and Procedure*.

In accordance with Bilingual Care's *Privacy and Confidentiality Policy and Procedure*, respect for and protection of consumers' privacy and confidentiality will be reinforced on an ongoing basis, verbally and in information promoting the services offered by the organisation. This includes their initial intake to the service and overall service access.

Where required, consumers will be provided with information and support to access a person of their choice, such as an advocate, to assist them to access the service. They will also be asked to confirm if they have family or carers, a registered supporter or other representative/s that they would like included in all conversations and dealings with Bilingual Care. See Bilingual Care's *Decision Making, Dignity, and Choice Policy and Procedure* for further information.

To ensure consumers understand the information that is provided and discussed, staff must communicate with them and their representatives in ways that suit their individual communication needs. Written information can be provided in different languages and Easy English or explained verbally by staff. Staff can also help consumers access interpreters or advocates where required. See Bilingual Care's *Social and Physical Accessibility Policy and*

Procedure for further information.

Bilingual Care uses the *Statement of Rights,* it's *Consumer Information Pack*, signage and website to ensure consumers and their representatives understand how to access Bilingual Care.

Service Environment

Bilingual Care's opening hours are 9.00am to 5.00pm Monday to Friday.

Bilingual Care ensures its service environment is kept clean, hygienic, safe, secure, and welcoming and inviting, through implementing its *Work Health and Safety*, *Risk Management*, *Incident Management*, *Feedback and Complaints, Continuous Improvement,* and *Inclusion, Diversity and Culturally Safe Service Delivery* policies and procedures.

Bilingual Care's physical accessibility is monitored through its *Social and Physical Accessibility Policy and Procedure*. Reasonable adjustments to the support delivery environment are made and monitored to ensure it is fit for purpose and that each consumer's health, privacy, comfort, dignity, quality of life, and independence are supported.

Bilingual Care takes a continuous improvement approach to its physical accessibility and encourages consumers to use its *Feedback and Complaints Policy and Procedure* to assist it to respond to accessibility needs where required.

Service Access

The Managing Director will deal with all enquiries from prospective consumers or their supporters about accessing services. If the Managing Director doesn't take the initial enquiry personally, they will contact the person seeking services within 1 working day or sooner.

In their first contact with the person who has enquired, the Managing Director will assess whether they require any support to move through the intake process. They will also:

- advise the person of their right to involve a support person in their dealings with Bilingual Care
- provide information and assist the person to access a support person of their choice, such as a registered supporter or an advocate, to help them to interact with the service (see Bilingual Care's *Decision Making, Dignity, and Choice Policy and Procedure*)
- where physical access barriers, or other issues such as availability of, or access to, transport, are identified, consider whether Bilingual Care is accessible for the person, and if not, how it could be made accessible (unless all contact is to occur at the consumer's home) and
- where a language or cultural barrier is identified, engage an interpreter or appropriate external agency to support the person. See Bilingual Care's *Decision Making, Dignity, and Choice Policy and Procedure*.

Referral

Should a potential consumer be referred to Bilingual Care by another service or third party, the Managing Director should complete the *Consumer Incoming Referral Form* with all relevant details and follow up with the consumer or their representative within 1 working day.

When making initial contact, the Care Partner must first ensure the consumer has consented to the referral before progressing any further conversations about Bilingual Care's services.

Initial Intake Process

1. **First contact** – the consumer and Bilingual Care are introduced via referral or the consumer making a direct enquiry. The consumer is provided with initial information about Bilingual Care and the available services. The consumer and/or their supporter/s / representative express interest in receiving services from Bilingual Care.

2. **Gather Information** – the Care Partner is responsible for gathering all required intake information about the prospective consumer to determine the next steps (this is usually via telephone, however, can be face-to-face or via other methods as required). All information will be documented in Bilingual Care's *Consumer Intake Form*. The Care Partner will confirm whether the consumer requires anyone else to be part of the conversation, such as family, registered supporter or substitute decision maker/s. The conversation will be rescheduled so they can be present if required.

   The Care Partner will gather the following information from the person enquiring:
   - a description of their initial needs, expectations, and preferences
   - confirmation that a formal Aged Care Assessment has identified the need for Support at Home services at a specified level
   - confirmation of their allocated Support at Home funding, the level and referral code (or whether they are waiting for their funding to be approved), or their desire to transfer from their current provider
   - confirmation of the timeframes they need to enter into a *Service Agreement* for Support at Home services, or transfer their Support at Home services by,
   - any other service providers the consumer wishes to be involved, and
   - any further personal details, should the person enquiring wish to progress with a face-to-face in-home meeting (with option to progress to initial assessment), and
   - "Is there anything we should know to support you in a way that feels right for you?"

   The Care Partner will provide the person enquiring with information about:
   - their rights, in accordance with the *Statement of Rights*
   - Bilingual Care's Vision, Mission, and Values, including its focus on meeting each consumer's individual needs and preferences, and how that applies to the consumer who is enquiring
   - Bilingual Care's available services and service model
   - Bilingual Care's procedures for commencing Support at Home services, including assessment, and goal setting
   - Bilingual Care's *Pricing Schedule* and how Support at Home services are charged
   - any other relevant information about Bilingual Care and how it delivers aged care services to suit consumers' needs and preferences.

3. **Check Eligibility** - The consumer's information and Support at Home classification / approved funding can be checked in the *My Aged Care Service and Support Portal* via the Service Referrals menu[2].

[2] Department of Health, Disability and Ageing (2026), *My Aged Care – Service and Support Portal user guide – Part 2: Team leader and staff member functions*, Australian Government, accessed 14 June 2026 https://www.health.gov.au/resources/publications/my-aged-care-service-and-support-portal-user-guide-part-2-team-leader-and-staff-member-functions?language=en

Prospective consumers are considered eligible if:

- they have been assessed as eligible for Support at Home funding and the funding has been allocated, or
- they wish to transfer their Support at Home services from another provider, and
- they reside in Bilingual Care's service area.

Priority of access will be based on:

- the timeframe the *Service Agreement* must be entered into
- the urgency of need and risks for the consumer, and
- whether Bilingual Care has the resources and capacity to provide care and services.

4. **Arrange first meeting** – the Care Partner will arrange an initial meeting if there is a potential match in the consumer's needs, eligibility and Bilingual Care's available services. This is generally face-to-face but can be via other methods by exception. Confirm the consumer's identity and any communication preferences or assistance the consumer will need for next steps (e.g. is an advocate, registered supporter or representative required, or information in other languages or translator required).

5. **Provide information** - the Care Partner will meet with the consumer and their supporter / representative and provide initial information in ways that meet their communication needs. The Care Partner will explain:
   - the *Statement of Rights* (and provide a copy)
   - the *Aged Care Code of Conduct*
   - feedback and complaints processes, including being able to make complaints to the Complaints Commissioner and whistleblower procedures
   - privacy and consent information, and how information will be used
   - available services
   - when and how *Care Plans* are developed and what's included
   - pricing for services, individual contributions information, and how to apply for hardship if required
   - monthly statements and how they will be provided
   - that the consumer may request a copy of Bilingual Care's financial position in writing, and this will be provided, and
   - how to exit services, including Bilingual Care's notice period to cease services, and
   - information as outlined in Bilingual Care's *Consumer Information Pack*

Should the prospective consumer wish to receive further information about Bilingual Care, they will be provided with Bilingual Care's *Consumer Information Pack*, a *My Aged Care* information booklet, and any relevant *My Aged Care* booklets, guides and fact sheets that will aid their decision making (such as *Researching Support at Home Providers*, *Entering into a Support at Home Service Agreement*, *How Fees are Calculated*, and *Changing Providers available from the My Aged Care Resources website*[3]).

Where the prospective consumer advises they would like to meet with the Managing Director to receive more information or commence initial assessment processes, see Bilingual Care's *Initial Assessment and Care Planning Policy and Procedure.*

[3] Department of Health, Disability and Ageing (2026), *Resources*, Australian Government, accessed 12 June 2026, https://www.myagedcare.gov.au/resources

Non-acceptance

Where a person is offered services but chooses not to accept the offer, staff will respect this choice.

If the consumer chooses not to proceed with Bilingual Care or the services cannot be provided by Bilingual Care, the Care Partner will reject the referral in the *My Aged Care Service and Support Portal*[4].

If Bilingual Care does not have current capacity, the consumer may be 'waitlisted' in the *My Aged Care Service and Support Portal*. Note: 'waitlisting' does not delay the timeframe for the consumer to find and engage a service provider – 56 calendar days of the consumer receiving their funding allocation letter or it is withdrawn (28 day extension can be requested).

The Managing Director will encourage the person to contact Bilingual Care should they change their mind.

Service Refusal

Bilingual Care may not be able to offer care and services to a consumer where:

- they do not meet Bilingual Care's eligibility requirements (for example they are yet to receive their funding allocation, or reside outside Bilingual Care's service area) or
- Bilingual Care does not have the resources to cater to the specific needs of the consumer.

The Managing Director is responsible for assisting the person with *My Aged Care* contact details, to support them to locate an aged care provider that can meet their needs.

Appeal

Anyone refused services has the right to appeal the Managing Director's decision. Appeals should be directed in writing to Bilingual Care's Managing Director and a final decision will be made by the Leadership Team.

If required, staff will provide support for a person to make an appeal, by either transcribing their feedback for the Managing Director's review or referring the person to interpreter or advocacy services.

Those not successful in their appeal will be provided written advice to this effect. For procedures for those who successfully appeal, see Bilingual Care's *Initial Assessment and Care Planning Policy and Procedure* to commence the onboarding process.

If a person is unhappy with outcome of their appeal, they will be directed to Bilingual Care's *Feedback and Complaints Policy and Procedure*.

[4] Department of Health, Disability and Ageing (2026), *My Aged Care – Service and Support Portal user guide – Part 2: Team leader and staff member functions*, Australian Government, accessed 14 June 2026 https://www.health.gov.au/resources/publications/my-aged-care-service-and-support-portal-user-guide-part-2-team-leader-and-staff-member-functions?language=en

Monitoring Accessibility and Demand for Services

The Marketing Manager tracks demand, as well as consumer and accessibility needs, by monitoring:

- ***demographic data*:** relating to the local community and its needs, from Local, State and Federal Government sources, including ABS data and specific aged care market data published by the Department of Health, Disability and Ageing, and the Aged Care Quality and Safety Commission
- ***unmet need:*** demographic data (as above), Bilingual Care enquiry data, and feedback from staff, including those involved in local service networks and
- ***opportunities for innovation and improvement:*** through monthly review of Bilingual Care's *Complaints Register* and *Continuous Improvement Plan*, and annual staff and consumer satisfaction surveys.

Continuous Improvement

Bilingual Care will maintain a record of consumers it has not been able to support, and the reasons for this, to track trends and any barriers that may inform continuous improvement activities (for example, the expansion of Bilingual Care's service area to meet demand and community need). This will be reviewed by the Leadership Team as part of continuous improvement activities and service planning.

Supporting Documents

Documents relevant to this policy and procedure include:

- *Feedback and Complaints Policy and Procedure*
- *Privacy and Confidentiality Policy and Procedure*
- *Inclusion, Diversity and Culturally Safe Service Delivery Policy and Procedure*
- *Work Health and Safety Policy and Procedure*
- *Risk Management Policy and Procedure*
- *Consumer Incident Management Policy and Procedure*
- *Workplace Incident Management Policy and Procedure*
- *Continuous Improvement Policy and Procedure*
- *Social and Physical Accessibility Policy and Procedure*
- *Service Delivery and Participation Policy and Procedure*
- *Initial Assessment and Care Planning Policy and Procedure*
- *Complaints Register*
- *Continuous Improvement Plan*
- *Consumer Incoming Referral Form*
- *Consumer Intake Form*
- *Consumer Information Pack*
- *Aged Care Code of Conduct*
- *Statement of Rights*

Monitoring and Review

This Policy and Procedure will be reviewed at least annually by the Leadership Team. Reviews will incorporate staff, consumer, and other stakeholder feedback. Consumers and service networks will be advised of any relevant changes.

Bilingual Care's feedback collection mechanisms, such as consumer satisfaction surveys and service delivery planning activities, will assess:

- consumer awareness of Bilingual Care's access procedures
- consumer satisfaction with Bilingual Care's physical and service access procedures, and management of service refusal and appeals
- whether consumers are satisfied with the service environment, service delivery, referral, and support to access other services
- whether Bilingual Care's eligibility criteria are reflected in its consumers and
- whether access and refusal information provided to consumers is appropriate and effective.

Bilingual Care's *Continuous Improvement Plan* will be used to record improvements identified and monitor the progress of their implementation. Where relevant, this information will be considered as part of Bilingual Care's service planning and delivery processes.

DOCUMENT CONTROL

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