

Intake Tasks

Intake between 9am – 12 noon Monday to Friday

Initial tasks for each morning

- Let reception and CSW know that you are Intake Worker that morning
- Check the Wellbeing Pigeon hole for yellow slips
- Check Intakecamcare email inbox
- Check camcare@camcare email inbox for anything related to Wellbeing Team

General and ongoing tasks

- Undertake any phone assessments required
- Undertake any phone call backs that are required
- Update allocations spreadsheet with any new allocations (allocate to pro bono or student a specific time, allocate to paid staff member and let them arrange appointment time)
- If comfortable case managers can allocate to counsellors if they feel comfortable to do so, and vice versa, but they don't need to if not comfortable to do so
- Update allocations spreadsheet with any changes of client times with counsellors
- Update allocations spreadsheet with any closures of clients
- Update IRIS with any new clients or allocated files as soon as you have spoken to a client who wants a service
- Move completed / actioned emails out of inbox into 'actioned emails completed' folder
- Send consent documents (standard consent, telehealth consent) if appointment booked

- If unfinished work put allocations form / notes in pigeon hole for next intake worker
- Ensure any actions taken on referrals are noted on referral form / yellow slip so next worker clear on all actions undertaken to date (this includes phone calls with no answer or messages left)
- Ensure standard counselling forms in compactus are stocked
- At end of day check in with front office for any issues / debrief
- Ask clients whether they would prefer telehealth appointment or face to face (wearing masks)
- Once a client has been attempted contact at least three times over a two week period with no response, close referral and put yellow slip / intake form in single session folder
- If you are changing anything with the process, or don't understand what has been done or why with a client / referral / process – then ask