T 02 4472 6939
E info@muddypuddles.org.au
W www.muddypuddles.org.au

PO Box 746
Batemans Bay NSW 2536

3.02 Individual Planning and Service Coordination Policy

Practice Standard linked to: 3. Provision of Supports / 3.2 Support planning

Purpose

This policy defines how Muddy Puddles conducts individual planning, goal identification and coordination of services for children and young people with a disability or developmental delay. Our processes must ensure each participant is actively involved in the development of their support plans and that support plans reflect client needs, requirements, preferences, strengths and goals, and are regularly reviewed.

Scope

This policy covers the client service lifecycle, from Client Intake, Service Planning, Support Provision, Evaluation, through to Review and Reporting.

Related policies

Service Design and Planning Policy
Rights and Responsibilities Policy
Service Access Policy

---

1. Assess and plan

The registration form captures background information and relevant information about diagnoses and goals. This should be reviewed before the first meeting with the client to avoid gathering the same information that has been requested previously and also used to prompt further discussion.

As soon as possible after registration, a Service Planning meeting is to be held involving a Practitioner and the client and/or the client's nominee. The participants in this meeting will depend on the age of the child or young person, a young person's need for support, the availability of Muddy Puddles practitioners and the choice made by the client or their nominee about who is involved in the planning meeting and who facilitates it.

The following tasks are to be completed during the Service Planning Meeting:

- Explain the purpose of the planning meeting (refer to Service Planning Meeting Agenda)
- Gather background information and get to know the client and their support network. There are several standard documents that can be used to assist this process , including Routines Based Interview Questions (for 0-6 years), Getting to know you (over 7 years), Support Map (all ages). These documents are found in the Standard Documents > Clients folder on Sharepoint. Information to be collected will be interests, functional ability, history, diagnoses, supports, concerns, what is important to the participant and family, assessment needs.

- Discuss the goals in the participant's NDIS Plan and review the funding categories available.
- Establish Service Goals (sub-goals) to focus on for the plan period. These sub-goals will feed into the client's NDIS goals and will relate to building functional capacity. Detail will be captured so the outcomes are clear and the progress can be measured.
- Discuss and agree on strategies and people who will be involved in the provision of supports to the client and when and where the services are to be provided.
- Identify other service providers involved in providing supports to the client.
- Discuss the policies and processes (refer to Welcome Pack) that will need to be complied with if the client engages Muddy Puddles services.
- Develop the Initial Service Plan (draft) and obtain the client's (or nominee) signature.
- Develop the Service Agreement and obtain the client's (or nominee) signature.
- Clearly communicate next steps.

2. Monitor and measure progress

After each activity provided to the client, the Muddy Puddles team member records notes in the client management system which include information to evaluate progress towards goals. Allied health professionals may use GAS, COPM and Vineland as recognised tools to monitor progress towards goals. The tools chosen will depend on individual needs. Overall progress is reported on in the client's Service Plan to indicate the following progress outcomes:

- Some progress
- Moderate progress
- Significant progress
- Goal achieved

The client and/or their approved support network are engaged in the goal monitoring process during scheduled intervention sessions.

3. Review plan

An Interim Review of the Service Plan is scheduled as a half-point check to report on progress and determine if goals are still relevant or if any changes are required to the Service Plan. The Plan can be reviewed earlier if there are any significant changes to the client's situation.

A Final Review of the Service Plan is conducted about 3 months before the end of the NDIS Plan to ensure there is time to provide progress reports and recommendations relevant to the NDIS Plan review.

The review should be conducted jointly by the Key Contact and/or relevant practitioners, and the results summarised on the Service Plan Report generated from the Client Management System.

Based on the results of the review and NDIS goals, the Plan may be updated and continue along similar lines, or another Assessment and Planning Session may be held to develop a new Service Plan.

Versions and approval

Version	Change	Approved by	Date Approved	Review Date
2.0	Update to new template; align to NDIS Practice Standards; change to goal measurement information and new processes and supporting documents developed	Board	August 2019	August 2021
1.0		Board Chair	May 2017	May 2018