



Intake Checklist

Before Your First Call with Havenridge Care

Welcome to Havenridge Care. To make your initial consultation as productive and comfortable as possible, we've prepared this checklist to help you gather the key information our team will need. You do not need to have everything ready — our team is here to guide you every step of the way.

1. Your NDIS Details

- Your **NDIS Participant Number** (found on your NDIS plan or any NDIS letter).
- Your current **plan management type**: Self-Managed, Plan-Managed, or NDIA-Managed.
- Your **plan start and end dates** — so we understand your funding timeline.
- Name and contact details of your **Plan Manager** (if plan-managed).
- Name and contact details of your **Support Coordinator** (if you have one).

Tip: Not sure of your plan type? Check your NDIS Welcome Letter or log into the myplace portal at my.ndis.gov.au. You can also call the NDIS on 1800 800 110.

2. Your Goals & Support Needs

Think about what a good week or month looks like for you. Consider:

- What activities or tasks do you find most difficult right now?
- What **goals** would you like to work towards — independence, community access, employment, skill building?
- What types of support are you hoping for — personal care, community participation, daily tasks, transport?
- Are there any **cultural, linguistic, or religious preferences** we should be aware of when matching you with a support worker?
- Do you have a preference for the **gender of your support worker**?

Tip: You don't need formal goals written down. Just thinking about 2–3 things you'd like to improve or achieve is a great starting point for our conversation.

3. Scheduling & Location

- Your **suburb and postcode** — to confirm we service your area.
- Preferred **days and times** for support (morning, afternoon, weekend, etc.).
- Whether support will be delivered **in-home, in the community, or both**.
- Any **transport requirements** — e.g. does your worker need a vehicle?



4. Health, Safety & Risk Information

To keep you and our team safe, it's helpful to know:

- Any **medical conditions or diagnoses** relevant to your supports (e.g. epilepsy, diabetes, mobility impairment).
- Medications that require prompting or assistance to take.
- Any existing **Behaviour Support Plans** or positive behaviour strategies.
- Mobility needs — use of wheelchair, walking frame, hoist, or other equipment.
- Any known **triggers, sensory sensitivities, or communication preferences**.
- Emergency contacts and any existing **Emergency Management Plans**.

Important: All information shared with Havenridge Care is treated with the strictest confidentiality and handled in accordance with the Privacy Act 1988 and the NDIS Practice Standards.

5. Key Contacts

GP / Doctor	Name & phone number for health-related updates
Plan Manager	For invoice processing and budget management
Support Coordinator	For plan implementation and service coordination
Emergency Contact	Trusted person to contact in an emergency
Parent / Guardian	If the participant is a minor or requires a representative

Tip: If you don't have all of this information ready — that's completely okay. Our intake team is experienced at gathering information gradually and at your pace. The most important thing is that you feel comfortable and heard from the very first conversation.

Ready to get started?

Call us on **0447 854 645** or visit havenridgecare.com.au to book your free, no-obligation initial consultation. We look forward to supporting you.