

Connection and Assessment Policy

1. Purpose:

The Y is committed to ensuring all service users are supported in appropriate ways, in a safe environment and in a way that recognises their rights and needs. This policy aims to outline what actions are required to create a consistent connection with the Y, assessing suitability and needs requirements to enable support to be provided.

2. Scope:

This policy is in relation to all Y Whittlesea Inclusion Services operations.

3. Definitions:

- **Y Person/People:** - includes employees, volunteers, contractors or sub-contractors, labour hire employees, apprentices or trainees and volunteers involved with the activities of the Y Whittlesea.
- **Connection** - a relationship in which a person or thing is associated with something else.
- **On-boarding** - go through procedures to effectively integrate (a new service user) into an organization or familiarize (a new customer or client) with one's products or services.
- **Participant** – a service user, client or person accessing the Y for supports
- **Representative** - a person connecting with the Y on behalf of another person
- **Connection** - the action or process of becoming connected with the Y
- **Registration** - – the act or process of entering information that the Y requires
- **Assessment** - the action of assessing someone or something.
- **Service**- the action of helping or doing work for someone.
- **CRM**- a customer relationship management system/ client file

4. Policy:

This policy is designed to ensure that each person engaging the Y has a consistent, well planned out service provision experience on first connection, during initial assessment and reassessments.

The Y understands how important it is to have.

- A first connection with Y that build trust, provides information and is responsive.
- A seamless onboarding processes that provides consistent information gathering to enable a quick connection to our programs, this process will ensure that individuals will be informed, comfortable and welcomed into the Y.
- A collaborative assessment process to successfully provide person centred support, review risk and design client focused supports.
- Periodic reassessment to ensure needs are being met, changes are identified to celebrate progress.

5. Related policies:

- Service Delivery Policy
- Service Access Policy
- Feedback, Concerns and Complaints Policy

6. Related procedures and supporting documents:

- Connection and Assessment Procedure
- Feedback, Concerns and Complaints Procedure
- Goal Procedure

7. Legislative and Industry Requirements:

- [Link](#) to Legislative Compliance Register

8. Consequences of breaching this policy:

All elements of this policy must be adhered to, and any breach will be dealt with in accordance with the [YMCA Whittlesea Disciplinary and Termination Policy](#).

9. Variations:

Y Whittlesea reserves the right to vary, replace or terminate this policy from time to time.

10. Policy owner:

The General Manager is responsible for keeping this policy current - including making amendments as required, and regular reviews as scheduled.

11. Document Control:

Review of this policy will be undertaken every two years, or prior as required by law, in consultation with appropriate Y People.

Policy available on Y-MAC>Communication>Manuals and Files>Policies and Procedures

This document is due for review on 6/01/2027.

Version:	Description of Amendment	Amended by	Approver and Date	Release Date
3.0	Reviewed and reformatted	Annette Jurisch	Annette Jurisch 06/01/2025	06/01/2025
2.0	Associated documents updated	Angela Napoleone	Annette Jurisch 14/03/2023	14/03/2023
1.0	New Policy. This policy is merged from the Connection and Onboarding Policy and the Registration and Assessment Policy Older Policies are now no longer in use	Annette Jurisch	Annette Jurisch 21/09/2020	21/09/2020