



CITY LOCALS INTAKE PROCEDURES

- 1) Local makes contact with Southwind Fields (enter name of new local into Monday "Incoming Local" Board)
- 2) Program Director sends application to appropriate person to be completed (enter status as "sent" into Monday app)
- 3) When the application is returned, with application fee, the program director scans it into the appropriate folder and emails a copy to CEO, CPO, COO, & Nurse. (update status as "received" in Monday app)
- 4) Program director sends email to appropriate party, letting them know that their application was received and that it will be reviewed on specific date of the next leadership meeting
- 5) Leadership team then reviews applications received at the next leadership meeting and approves or denies the application (update status on Monday app as appropriate)
- 6) Program Director sends response email/letter (use template) to appropriate party.
 - If denied, Program director should include a list of appropriate resources that may be of help to the local and/or his/her family, Always include Autism Lifeline Links for those with Autism
- 7) If approved, set up interview (in person or via telephone - facetime/FB messenger, or similar app is proffered method for out of town interviews) in coordination with schedule of at least one c-level officer and local/local's family, unless otherwise specified.
- 8) Conduct interview
- 9) Upon completion of the interview, those present will make a general consensus on the approval or denial of the local into the program
- 10) If approved, Program Direct sends welcome letter from Southwind Fields family to incoming local, with explanation of next steps and "roommate pool". (update status of "Response Sent" on Monday app). If denied, email is sent, with above mention template, and list of resources.
- 11) Local is placed into "roommate pool" until appropriate match is made
- 12) Once match has been made, incoming local is assigned to a Local Advisor
- 13) Local Advisor creates chart with confidential covers, etc. (see intake checklist)

- 14)** Local Advisor (LA) assists family with contacting/touring partnered apartment complexes. LA should accompany on all tours with partnered complexes. May accompany on tours of non-partnered complexes, as tie permits, but should reinforce “community strong” concept with families looking outside of partnered complexes. (update in Monday app)
- 15)** Once one has been chosen, LA may assist, as necessary is application process for apartments (update on Monday as appropriate)
- 16)** During this time, LA should remind family that registration fee is due before date of move-in to assist in covering administration fees, background checks, etc. Registration fee can be waived for locals who are being sponsored by third parties and in other special circumstances, at discretion of the CEO.
- 17)** Move-in date is scheduled upon approval from apartment complex (update on Monday app)
- 18)** Any needs of incoming locals (furniture, food, cleaning supplies, etc.) should be made known before move-in and development director/LA should begin looking for donations as necessary
- 19)** LA completes intake packet on Move-in day or within 48 hours of move-in at the latest, thoroughly explaining each form and fee schedules (fees due on 1st of each month) for upcoming month. First month fees may be negotiated for locals moving in after the 20th of the month, for that month, but should be paid, in full, for upcoming month (see intake packet checklist and update on Monday doc tracker app)
- 20)** LA schedules time for assessment with Local and schedules with nurse to participate
- 21)** LA schedules care team meeting for service planning
- 22)** LA completes assessment within 10 days of move-in (update doc tracker on Monday app)
- 23)** Care team meets for service planning, local should be invited but attendance is not mandatory
- 24)** LA completes service plan (update in Monday app) and shares with local at next visit