

# CARE INTAKE & ONBOARDING SCORECARD

**PURPOSE** To ensure that new clients are enrolled quickly, compliantly, and with a clear plan of care – setting the tone for a trusted care relationship and operational excellence.

**DIRECTIONS** For each metric, assign an owner and set a goal. The owner will be the person for ensuring the item is recorded each week - but that doesn't mean they are necessarily responsible for hitting the goal.

The goal should be set based on your organization's objectives and what you need to do each week to achieve them.

METRIC	OWNER	WEEKLY GOAL	ACTUAL
% of intakes completed within 72 hours			
Client satisfaction score after first week			
% of completed documentation before start of care			
% of matched caregiver on first attempt			

