Log an activity or internal note

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This article provides guidance for all NDIA staff and partners to:

- check if there is an open case
- decide if a follow-up action or review is required
- log an activity or internal note to the case
- log an activity or internal note to the person account
- understand how to log an activity as a JAWS user.

This could be recording contact with an applicant, participant, authorised representative, provider, unauthorised person, contact attempt or internal note.

1 Recent updates

6 May 2024

- New section for how to add an activity or internal note to the person account if there is no relevant open case and no further follow-up action required. You no longer need to create an enquiry case for this scenario.
- Included a step that you **must** add the person and related contacts to the 'Name' field, otherwise the activity or internal note will not appear on the person's account.
- Update to include reference to 'contact attempt' in the introduction section to support you to find the correct article when recording a contact attempt.
- Update to section 'Before you start' to include scenarios for when you need to log an activity or internal note.
- Emphasised that you **must** log an activity **every time** you contact a person and included additional examples to support this.

2 Before you start

You either:

- contacted a person or they have contacted you
- made a contact attempt
- need to record an internal note.

3 Check if there is an open case

1. Check if there is a related open case:
   - If there is a related open case, go to section **Log an activity or internal note to the case**.
   - If there is no related open case, go to section **Decide if a follow-up action is required**.

4 Decide if a follow-up action is required

1. Decide if a follow-up action or review is required, or if the enquiry is resolved at first contact:
    - If follow-up action is required, create the appropriate case to action the enquiry. Then go to section **Log an activity or internal note to the case**.

    For example, if the participant is calling to update their address, create an **Update Person Account** case.

    - If no follow-up action is required, go to section **Log an activity or internal note to the person account**.

5 Log an activity or internal note to the case

You **must** log an activity **every time** you contact or meet an applicant, participant, their provider, or authorised representative, For example, when you:

- contact a person about an access or plan decision, information gathering or requesting more evidence
- support a participant to use their plan
- arrange or conduct a meeting. For example, information gathering or check-in
- provide support to link to community and mainstream supports
- update the person's account. For example, updates to their profile, roles or authorities, or their my NDIS contact
- respond to a complaint or incident.

You must also log an activity to create an **Internal Note** when you contact an NDIS team member or when leaving information for them to review or action.

1. From the **Person Account** screen, select **Cases**.
2. Select the relevant **Case**.
3. Select **Log Activity** on the **Activity** panel on the right.
4. Select **Create New** or **Add**.
5. At **Name**, make sure the person is listed and add related contacts. For example, the applicant or participant. **Do not leave this blank**. You **must** add the person and related contacts, otherwise this activity or internal note will not appear on the person's account.
6. Select the **Activity Type**:
    - **Inbound Phone Call**
    - **Outbound Phone Call**
    - **Inbound Email**
    - **Outbound Email**
    - **Webchat**
    - **Internal Note**
    - **Face to Face**
    - **Virtual**
    - **SMS**.
7. Select an **Outcome**, depending on the **Activity Type** you choose.
8. Select a **Subject**:
    - **Contact with Participant**
    - **Contact with Authorised Person**
    - **Contact with Provider**
    - **Contact with Unauthorised Person**
    - **Contact Attempt**
    - **Internal Communication**.
9. Add **Comments** that are relevant to the case type. To learn more, read articles relevant to the case type.
10. Select **Save**.

Note: When you log an activity, it displays on the **Person Account Timeline** and the **Activity** tab. To learn more, go to article View the Person Account Timeline.

11. After you record comments, continue working through the case using the articles relevant to the case type.

6 Log an activity or internal note to the person account

If there is no related open case and no further follow-up action or review is required, add the activity or internal note to the person account.

Do not log an activity to the person account if there is a related open case, a new case is required, or follow-up action is required.

1. Navigate to the relevant **Person Account**.
2. Select **Log Activity on Account** from the highlight panel.
3. Select the **Activity Type**:
   - **Inbound Phone Call**
   - **Inbound Email**
   - **Webchat**
   - **Face to Face**
   - **Virtual**.
4. Select a **Subject**:
   - **Contact with Participant**
   - **Contact with Authorised Person**
   - **Contact with Provider**
   - **Contact with Unauthorised Person**.
5. Select the **Category**:
   - **Information about the NDIS**
   - **Reports and Evidence**
   - **Plan or Budget**
   - **Portal or App**
   - **Provider**
   - **General Question**
6. Add **Comments** that are relevant to the enquiry.
7. Select **Save**.

Note: When you log an activity, it displays on the **Person Account Timeline** and the **Activity** tab. To learn more, go to article View the Person Account Timeline.

8. No further action required.

7 Tips for JAWS users

7.1 Quickly navigate to the activity panel

- Press **Control plus End** to go to the end of the screen.
- Press **Shift plus H** to skip to **Headings**.
- Press the **down arrow key** to go to the **Activity** tab. The **Activity** tab is the default.
- Continue to use the **down arrow key** to go to the **Log Activity** sub-panel.
- You can also press **B** to go directly to the **Create New dot dot dot** button then press **Enter** to activate. The **Log Activity** form displays.

7.2 Fill in the Log Activity form

- The **Name** field auto-fills the **Contact** for the case. To change the **Contact** use the **Name** field to search the NDIS number or name.
- Select an **Activity Type**. The **Activity Type** determines the value in the **Outcome** field. If the **Outcome** field is not active, an **Activity Type** is not required. For example, **Internal Notes** does not need an **Outcome**.
- Select the **Subject** field from the list of five choices.
- When tabbing from the **Subject** field, JAWS will announce 'Please add additional notes here'. This is a tool tip. Press **Tab** again to get to the input area to type your comments for the activity.

Note: To go back to review information in the form, switch to virtual PC mode and use **arrow keys** to navigate. There is a known issue when using **Shift Tab** to navigate back. If **Shift Tab** is used to go back from the **Comment** field, it will announce 'Insert Quick Text Button'. This button is not announced when navigating forward. If **Shift Tab** is used again JAWS reads out the name of the case and case number.

When to refer the participant for an eligibility reassessment

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This article provides guidance for a local area coordinator, early childhood partner or planner delegate to:

- consider an eligibility reassessment
- complete an eligibility pre-check by reviewing available information
- understand when to refer the participant for an eligibility reassessment.

1 Recent updates

3 October 2024
Guidance updated:

- to reflect legislation changes from 3 October 2024
- title has been updated from 'Understand eligibility reassessment referral requirements' to 'When to refer the participant for an eligibility reassessment'
- content from article **Complete and eligibility reassessment referral**, relating to referral decisions has been placed here
- content on creating the case and contacting the participant has been moved to article **Complete an eligibility reassessment referral**.

2 Before you start

You have read and understood:

- Our Guideline – Applying to the NDIS (external)
- Our Guideline – Leaving the NDIS (external) section **Are you still eligible for the NDIS?**

Early childhood partners have read and understood articles:

- EC: Guide – Check-in eligibility conversations for children younger than 6 with developmental delay
- EC: Guide – Evidence sources to demonstrate if an impairment is likely to be permanent for children who previously met access for developmental delay.

To learn more about leaving the NDIS read:

- Our Guideline – Reviewing our decisions (external)
- article Understand the leaving case.

3 Consider an eligibility reassessment

We may need to check a participant's eligibility if information shows they may no longer be eligible, or their disability support needs, or situation has changed. We call this an eligibility reassessment. For more information see Our Guideline – Leaving the NDIS (external).

If the participant met disability requirements, we don't need to check their eligibility at every plan reassessment. We only need to check if we get evidence they may no longer be eligible.

If the participant met the early intervention requirements, an automatic referral may be created.

3.1 Automatic eligibility reassessment referrals

An eligibility reassessment case will be generated automatically when the participant:

- with developmental delay turns 6
- with global development delay turns 7
- who is eligible under the early intervention requirement has a primary impairment of hearing loss and turns 26.

If an automatic case has been generated, the participant's my NDIS contact will be notified via the **Omni-Channel** to start an eligibility reassessment checklist. They will consider all information to determine if an eligibility reassessment is needed.

When completing an automatic referral, check for more information about the participant before completing the referral.

1. Complete section **Review evidence on the participant record**.
2. Complete section **Review the participants original access decision and information**.
3. Then continue to article Complete an eligibility reassessment referral.

3.2 Manual eligibility reassessment referrals

Sometimes you will need to manually create an eligibility reassessment referral. For example, if you receive a report from the participant's treating professional that says their disability support needs have changed.

If the participant's situation has changed and you think they need an eligibility reassessment, you can manually make an eligibility reassessment referral. This can take place:

- as part of the plan reassessment process
- at check-in
- at any other time.

First you need to complete an eligibility pre-check to confirm whether you need to create an eligibility reassessment referral. Continue to section **Complete an eligibility pre-check by reviewing available information.**

4 Complete an eligibility pre-check by reviewing available information

4.1 Check the participant has received funding for 14 months

1. Go to the participant's **Person Account**.
2. Go to the **Account Timeline** in the navigation pane.
3. Find the first **Plan Approval** case in the Timeline.

Note: this will usually be at the bottom of the list.

4. Check the date of the **Access Decision** date. Is this more than 14 months ago?

Note: If there is no date in PACE, check **SAP CRM** for this information. If:

- **Yes:** continue to section **Check for any open ER or Leaving cases**.
- **No**: the eligibility reassessment will not continue to be considered until after the participant has received NDIS funding for 14 months. It will remain in the Eligibility Reassessment Hold Queue until the 14 months are up. If you choose to continue with the referral, go to section **Check for any open ER or Leaving cases**.

4.2 Check for any open ER or Leaving cases

1. Go to the participant's **Person Account**, **Cases** tab.
2. Check **Open Cases** for an existing:
   - **Eligibility Reassessment** case
   - **Leaving the NDIS** case
3. Is there an existing case in progress? If:
   - **Yes**: they cannot be referred for an eligibility reassessment. **End of process**.
   - **No**: continue to section **Review evidence on the participant record.**

4.3 Review evidence on the participant record

1. Check all available information to make sure you give an accurate referral based on the participant's **current** situation. Check:
   - any relevant documents on the participant's record
   - medical, clinical, diagnostic or assessment reports
   - provider reports and assessments such as progress reports
   - early childhood partner documents
   - information from family members and carers, such as a carer impact statement.

   Note: You don't need to ask the participant to give any new or additional information to pre-check eligibility.

4.4 Review the participants original access decision and information

The **Decisions**, **Justifications and Evidence** (DJE) framework of the **Access Decision** case records evidence used. It helps record decisions to meet the requirements of the participant service guarantee and the NDIS Act (2013).

1. Go to the participant's **Person Account**, **Decisions** tab.
2. In the **Decision Name** column, select **Access Decision**.
3. Review all information within the **Details** tab to understand how the participant met the access criteria for the NDIS.
4. Go to the **Decisions** tab, and review all **Justifications** and sub-criterion decisions made for the access decision.
5. Review all **Evidence/explanation**, read the type of evidence and documents recorded to support the access decision.
6. In **Sub-decisions**, read the **Decision Name** and how the participant met the access criteria for the NDIS.

5 When to refer the participant for an eligibility reassessment

1. Has the participant's support needs or circumstances changed? If:
    - **Yes**, continue to step 2.
    - **No**, they cannot be referred for an eligibility reassessment. **End of process**.
2. Check whether the participant that met access under the disability requirements, now appears to no longer meet residence requirements, or no longer meet the disability and early intervention requirements. If:
    - **Yes**: continue to section **Commence an eligibility reassessment referral**.
    - **No**: they cannot be referred for an eligibility reassessment. **End of process**.
3. Check whether the participant that met access under the early intervention requirements, and now they are likely to no longer meet residence requirements, or no longer meet the early intervention requirements, and now meet disability requirements. If
    - **Yes**, go to section **Commence an eligibility reassessment referral**.
    - **No**, they cannot be referred for an eligibility reassessment. **End of process**.

      Note: A participant can meet both the disability and early intervention requirements.

5.1 Commence an eligibility reassessment referral

1. Create a new eligibility reassessment case using article Complete an eligibility reassessment referral.

What evidence of disability is required

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6 What if the applicant lives in a remote region? 9
7 Next steps 10

This article provides guidance for a local area coordinator, early childhood partner, or access delegate to understand:

- who can provide evidence of disability
- what evidence does the NDIA require
- how to check evidence
- what to do if the applicant lives in a remote region.

1 Recent updates

3 October 2024
Linked article title changed from How to complete the access request case form to Complete form in the access request case.
Updates to improve accessibility and consistency with related articles.

2 Before you start

You have read and understood Our Guideline – Applying to the NDIS (external) including section **Do you meet the disability requirements?**

3 Who can provide evidence of disability?

A person's treating professional must provide disability evidence.

Evidence provided by treating professionals – such as medical reports – needs to consist of genuine, original documents. The information must also be specific to the person applying.

Before accepting evidence from a treating professional, you should read the article Check treating professional details.

4 What evidence does the NDIA require?

Anyone applying for the NDIS needs to have evidence of disability, regardless of what NDIS support they are asking for. A person's evidence needs to show they meet all of the disability requirements.

The person should provide this evidence with their application. This could be either when they first submit, or during the eligibility check stage.

You can't submit the access request case until you have evidence of disability from the person.

5 How to check evidence

Before the person's NDIS eligibility decision can be made, you need to check that the person's disability evidence:

- Is from a treating professional registered with AHPRA (the Australian Health Practitioner Regulation Agency). Use article Check treating professional details.
- Provides enough information to show if the person is eligible for priority application decision. Use article Request priority eligibility decision.
- Records any requests for an exemption. Use article: Log an activity or internal note.
- Demonstrates that the person has a condition from List A (external), List B (external) or List D (external).
- Shows if the person meets all 5 of the disability requirements. Use article Understand disability requirements.

If the evidence does not show **each** of the above, the applicant will need to provide additional evidence.

6 What if the applicant lives in a remote region?

The NDIA makes some exceptions to the evidence requirements for people living in remote regions of Australia. In such regions it may be difficult to provide evidence – or even obtain it in the first place.

When you support applicants who live in **very remote** communities, you must record information about their:

- local health service
- consent for the NDIA to talk to the local health service
- local community connection contact
- Council and/or Department of Social Services contact in the area.

To be eligible for an exemption, the person must live in a Remote or Very Remote location. This would mean an 'MM6' or 'MM7' region, under the Modified Monash Model (external).

If this is the case, you should talk with your team leader about the application. They can help you consider options and alternatives for the person's circumstances.

7 Next steps

If you are completing an access request case, continue following the guidance in article Complete form in the access request case.

Understand disability requirements

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This article provides guidance for all NDIA staff and partners to understand:

- eligibility under the disability requirements
- how to weigh evidence of disability.

1 Recent updates

3 October 2024

Updates to reflect legislation changes from 3 October 2024:

- applicants may now meet both disability and early intervention requirements, instead of just one
- the disability requirement has changed from lifetime supports under the NDIS to NDIS supports for their lifetime.

2 Before you start

You have:

- read and understood Our Guideline – Applying to the NDIS (external), including section **Do you meet the disability requirements?**
- read article What evidence of disability is required?
- read article Check eligibility – age and residence requirements.

3 Overview

To be eligible for NDIS, the person must meet the requirements for:

- age
- residence
- disability, early intervention, or both.

4 Disability requirements

To meet the disability requirements, we must have evidence of all of the following:

- their disability is related to an impairment
- their impairment is likely to be permanent
- their permanent impairment significantly reduces their functional capacity to undertake one or more of the following activities: moving around, communicating, socialising, learning, or undertaking self-care or self-management tasks
- their permanent impairment affects their ability to work, study or take part in social life
- they'll likely need NDIS support for their lifetime.

4.1 Check eligibility for disability requirements

Use these articles to check evidence for a decision:

- Check eligibility – DIS – disability caused by an impairment
- Check eligibility – DIS – likely permanence
- Check eligibility – DIS – significant functional impact
- Check eligibility – DIS – social and economic impact
- Check eligibility – DIS – NDIS supports for life.

4.2 Additional considerations

Use these articles before you check evidence for a decision.

Check if there is evidence of a condition on List A. Go to Check eligibility – List A condition.
Note: A person is likely to meet the disability requirements if they provide evidence of their diagnosis.

Check if there is evidence of a condition on List B. Go to Check eligibility – List B condition.
Note: A person is likely to meet **some** of the disability requirements if they provide evidence of their diagnosis.

5 How to weigh evidence of disability

When you weigh the relevance and importance of the provided disability evidence, consider:

- who is providing the evidence of disability?
- how old is the evidence of disability (particularly relevant for functional capacity evidence)?

For further information, refer to Our Guideline – Applying to the NDIS (external), including sections:

- **What information do we need in your application?**
- **Who can give us evidence of your impairments?**
- **How do we weigh evidence of disability?**

6 Next steps

To consider the early intervention requirements, go to article Understand early intervention requirements.

If you are an access delegate:

- to make an access decision, continue to article Make an access decision – pre-legislation changes or Make an access decision – post legislation changes.
- to make an eligibility reassessment decision, continue to article Finalise eligibility reassessment decision.

Check treating professional details

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This article provides guidance for an **access delegate** to check treating health professional details.

1 Recent updates

November 2023

- Title changed from ‘Check treating health professional details to come into line with companion article ‘Record treating professional details’ and OG – Applying
- AHPRA URL added to 2nd instruction to check details of treating health professional.

2 Before you start

You have read and understood:

- Our Guideline – Applying, in particular How do we decide if you're eligible?

3 Check treating health professional details

When assessing a person's NDIS application, you **must** check that evidence regarding a person's disability is provided from a suitably accredited and/or registered treating professional. To check and confirm their details, use the Australian Health Practitioner Regulation Agency (AHPRA) website.

For all evidence of disability documents:

1. Obtain the treating health practitioner details
2. Refer to the AHPRA website
3. Navigate to the **Look up a practitioner** section in the top right-hand corner of the page
4. Review the list of professions that can be confirmed in AHPRA
5. Search for each treating health professional via **Name** or **Registration Number**
6. Use the filters if you need to refine the search results
7. Select the relevant treating professional
8. Review to check they have current qualifications and registration.

Note: All evidence from a treating professional with a profession listed in AHPRA must be checked to make sure they are currently registered. For a list of AHPRA regulated professions visit the AHPRA website.

If you have any concerns about the evidence of the treating professional details, you should escalate as an integrity issue.

4 Next steps

1. To learn more about integrity issues, refer to article Escalate application integrity issue.
2. To record the AHPRA registration number of a treating professional refer to article Record treating professional details.

Check eligibility – age and residence requirements

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This article provides guidance for an access delegate, local area coordinator, early childhood partner and review officer to understand how to:

- make a decision on age requirements
- make a decision on residence requirements.

1 Recent updates

3 October 2024
Article title changed from Check evidence for a decision – Age and residence requirements to Check eligibility – age and residence requirements.

2 Before you start

You have read and understood Our Guideline – Applying to the NDIS (external).

3 Make a decision on age requirements

When assessing an application for a person to become a participant of the NDIS, you **must** first assess they meet the age requirements.

To learn more, refer to Do you meet the age requirements? (external) In Our Guideline – Applying to the NDIS.

4 Make a decision on residence requirements

The next step when assessing an application for a person to become a participant of the NDIS, you must assess they meet the residence requirements.

To verify a person's residence details, if Centrelink **consent has** been given check the person's Centrelink record to confirm residence status. If **consent has not** been given, review the residence documentation provided to support the person's application.

To learn more, refer to Do you meet the residence requirements? (external) in Our Guideline – Applying the NDIS.

To learn more regarding evidence of age and residence, see article Understand age and residence evidence.

Check eligibility - DIS – disability caused by an impairment

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3.1 How to find evidence a disability is related to an impairment 6

3.2 What to consider when making an eligibility decision 6

4 Next steps **7**

This article provides guidance for all NDIA staff and partners to understand:

- how to find evidence showing disability is related to an impairment
- what to consider when making an eligibility decision for this requirement.

1 Recent updates

3 October 2024

- Article title changed from Check evidence for a decision – disability caused by impairment to Check eligibility – DIS – disability caused by an impairment
- When we say DIS in a title, we mean disability requirements. We've added this to help you quickly identity which articles are for disability or early intervention requirements.

2 Before you start

You have read:

- and understood Our Guideline – Applying to the NDIS (external) section **Do you meet the disability requirements?**
- article Understand disability requirements
- article What evidence of disability is required?

3 Evidence an impairment is caused by a disability

3.1 How to find evidence a disability is related to an impairment

You need to review all available information about the person's impairment and disability before making a decision. To do this, check their application and evidence in PACE.

3.2 What to consider when making an eligibility decision

To make an eligibility decision about this **disability** requirement, consider:

- the person's impairment
- their disability
- our legislation and guidance
- if we have enough evidence to decide or need more.

The disability requirements are just one of the eligibility requirements. To be eligible for the NDIS, the applicant must also meet the age and residence requirements. Go to article Check eligibility – Age and residence requirements.

4 Next steps

If you are an access delegate:

- to determine eligibility, continue to follow guidance in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes.
- to check the timeframes to make a decision, follow guidance in article Check decision – Legislative timeframes.

Check eligibility – DIS – likely permanence

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3.1 Review evidence of likely permanence 6

4 Next steps 7

This article provides guidance for all NDIA staff and partners to review evidence of likely permanence.

1 Recent updates

3 October 2024

- Article title changed from Check evidence for a decision – Disability requirements – Likely permanence to Check eligibility – DIS – likely permanence.
- When we say DIS in a title, we mean disability requirements. We've added this to help you quickly identity which articles are for disability or early intervention requirements.

2 Before you start

You have read:

- and understood Our Guideline – Applying to the NDIS (external) section **Do you meet the disability requirements?**
- article Understand disability requirements
- article What evidence of disability is required?

3 Evidence of likely permanence

3.1 Review evidence of likely permanence

You need evidence an applicant will have the impairment for their lifetime to be eligible for the NDIS. To confirm their permanent impairment, we need evidence from their doctor or specialist.

The impairment may be episodic or vary in intensity. This means it will still be permanent due to the overall impact on their life and likelihood they'll be impacted across their lifetime.

Even when their condition or diagnosis is permanent, we'll also check if the impairment is permanent as well. For example, they may not be eligible if the impairment is temporary, still being treated or if there are known, available and appropriate evidence-based clinical, medical or other remaining treatments options that are likely to remedy the impairment.

We'll generally consider if their impairment is likely to be permanent, after all available and appropriate treatment options have been pursued.

If an applicant gives us evidence they're diagnosed with a List B (external) condition, we'll usually decide if their disability from an impairment is likely to be permanent.

For more information, go to section **Is your impairment likely to be permanent?** In Our Guideline – Applying to the NDIS (external).

The disability requirements are just one of the eligibility requirements. To be eligible for the NDIS, the applicant must also meet age and residence requirements. Go to article Check eligibility – Age and residence requirements.

4 Next steps

If you are an access delegate:

- to determine eligibility, continue to follow guidance in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes.
- to check the timeframes to make a decision, follow guidance in article Check decision – Legislative timeframes.

Check eligibility – DIS – NDIS supports for life

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This article provides guidance for an access delegate to review evidence to check if a person is likely to need NDIS supports for their lifetime.

1 Recent updates

3 October 2024

Updates to reflect legislation changes from 3 October 2024.

Article title changed from Determine lifetime support eligibility to Check eligibility - DIS – NDIS supports for life.

When we say DIS in a title, we mean disability requirements. We've added this to help you quickly identity which articles are for disability or early intervention requirements.

2 Before you start

You have read and understood:

- article Understand disability requirements
- article Understand early intervention requirements
- Our Guideline - Applying to the NDIS (external) section **Will you likely need NDIS support for your lifetime?**

3 Review evidence

To be eligible for the NDIS, a person must likely need NDIS supports for their lifetime. To approve their application, you need to see evidence showing this. NDIS supports are the services, items and equipment that can be funded by the NDIS. NDIS supports are investments that help a participant build or maintain their functional capacity and independence, and help them work, study or take part in social life.

When we decide if an applicant will likely need NDIS supports for their lifetime, we consider:

- their life circumstances
- the nature of their long-term support needs
- whether their needs could be best met by the NDIS, or by other government and community services.

When you're deciding if a person is eligible, you need to review:

- how old the evidence is
- who provided the evidence.

If a person provides more than one piece of evidence, you may need to consider one as more relevant than others. We call this weighing evidence.

For further information:

- read Our Guideline - Applying to the NDIS (external) section, **How we weigh evidence of disability?**
- refer to article What evidence of disability is required?.

4 Next steps

To consider the other disability requirements, go to article Understand disability requirements.

If you are an access delegate:

- to make an access decision, continue to article Make an access decision – pre-legislation changes or Make an access decision – post legislation changes.
- to make an eligibility reassessment decision, continue to article Finalise eligibility reassessment decision.

Check eligibility – DIS – significant functional impact

SGP KP Publishing

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This article provides guidance for all NDIA staff and partners to review evidence of the impairment that substantially reduces functional capacity

1 Recent updates

3 October 2024

- Article title changed from article - Check evidence for a decision - Significant functional impact to Check eligibility – DIS – significant functional impact.
- When we say DIS in a title, we mean disability requirements. We've added this to help you quickly identity which articles are for disability or early intervention requirements.

2 Before you start

You have:

- read Our Guideline – Applying to the NDIS (external) including the section **Does your impairment substantially reduce your functional capacity?**
- read articles Understand disability requirements, What evidence of disability is required? and Make an access decision.

3 Evidence of significant functional impact

3.1 Review evidence of the impairment that substantially reduces functional capacity

We need to learn about the person's impairment before we can make a decision about their eligibility.

To do this you need to check their application and evidence in PACE.

You need evidence the person's impairment substantially reduces their functional capacity in one or more of the following areas:

- communication
- social interaction
- learning
- mobility
- self-care
- self-management (if older than 6).

A person's needs might vary from time to time. This means they may go up and down each day or each month. A good example of this can be progressive multiple sclerosis. We consider a person's ability over time and take into account how their ability fluctuates.

When a person's impairment substantially reduces their functional capacity, they usually need disability-specific supports to join in or do these tasks and activities.

These disability-specific supports include:

- support from other people, such as physical assistance, guidance, supervision or prompting.
- assistive technology, equipment or home modifications prescribed by the person's doctor, allied health professional or other medical professional.

To decide if a person is eligible, you need to determine their capacity and where they need more help. To decide if a support is reasonable and necessary, you need to consider what information you have available to identify if the person meets the NDIS funding criteria (external).

If a person has more than one permanent impairment, you will need to consider them together to see if their functional capacity is reduced substantially.

You need to consider:

- the person's involvement in different areas of life, like at home, school, work and in the community
- how they carry out tasks and activities
- any other factors impacting their everyday life.

The disability requirements are just one of the eligibility requirements. To be eligible for the NDIS, the applicant must also meet the age and residence requirements. Go to article Check eligibility – Age and residence requirements.

4 Next steps

If you are an access delegate:

- to determine eligibility, continue to follow guidance in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes.
- to check the timeframes to make a decision, follow guidance in article Check decision – Legislative timeframes.

Check eligibility – DIS – social and economic impact

SGP KP Publishing

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This article provides guidance for all NDIA staff and partners to:

- understand what evidence of social and economic impact is
- know when to ask for technical advice.

1 Recent updates

3 October 2024

- Article title changed from Check evidence for a decision – Disability requirements – social and economic impact to Check eligibility – DIS – social and economic impact
- When we say DIS in a title, we mean disability requirements. We've added this to help you quickly identity which articles are for disability or early intervention requirements.

2 Before you start

You have:

- read Our Guideline – Applying to the NDIS (external) including sections **Does your impairment affect your social, work or study life?** and **Do you meet the disability requirements?**
- read articles Understand disability requirements and What evidence of disability is required?

3 Understanding evidence of social and economic impact of an impairment for disability requirements

3.1 What is evidence of a social and economic impact?

We need evidence of how an impairment affects a person's ability to work, study or take part in social life.

This means evidence of the impact on how the applicant can find and keep a job, contribute to the community, or join social activities because of their permanent impairment.

For children with evidence of social or economic impact or both, go to article Understand early intervention requirements.

4 When you need to ask for technical advice

You **must** request advice from the Technical Advice and Practice Improvement Branch (TAPIB) if you are considering an access met decision for a person with a chronic health condition. Go to article Create a technical advice case.

To learn more, read Requesting TAPIB Advice on the NDIA Intranet.

The disability requirements are just one of the eligibility requirements. To be eligible for the NDIS, the applicant must also meet the age and residency requirements. Go to article Check eligibility – Age and residence requirements.

5 Next steps

If you are an access delegate:

- to determine eligibility, continue to follow guidance in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes.
- to check the timeframes to make a decision, follow guidance in article Check decision – Legislative timeframes.

Check eligibility - EI - Developmental delay

SGP KP Publishing

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3 How to find developmental delay evidence **6**

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3.2 What to consider when checking eligibility 6

4 Next steps **7**

This article provides guidance for all NDIA staff and partners to understand how to find developmental delay evidence.

1 Recent updates

3 October 2024

- Updates to reflect legislation changes from 3 October 2024.
- Article title changed from Check evidence for a decision – developmental delay to Check eligibility – EI – Developmental delay.
- When we say EI in titles we mean early intervention requirements. We've added this to help you identify articles about early intervention or disability requirements.

2 Before you start

You have read and understood:

- Our Guideline - Applying to the NDIS (external), **what about children younger than 6 with developmental delay?**
- Our Guideline - Early childhood approach (external)
- article Understand early intervention requirements
- article Check eligibility – age and residence

3 How to find developmental delay evidence

3.1 How to find developmental delay evidence

You need to review all available information about the child's impairment and developmental delay before you make an access decision. To do this, check their application and linked evidence in PACE. To find linked evidence in PACE select the **Documents** tab. This will provide a list of the documents that have been linked as evidence. For example, the completed Form – Evidence of development delay.

3.2 What to consider when checking eligibility

When you review evidence to check if the child is eligible under this **early intervention** requirement, consider:

- the child is younger than 6
- the child's impairment
- the child's developmental delay
- the recommended early intervention supports
- if the early intervention supports recommended are NDIS support
- recommendation have been made by the right early childhood professional
- our legislation and guidance
- if we have enough evidence to decide or need more.

4 Next steps

To consider the other early intervention requirements, go to article Understand early intervention requirements.

If you are an access delegate:

- to make an access decision, continue to either article Make an access decision – pre-legislation changes or Make an access decision – post legislation changes.
- to make an eligibility reassessment decision, continue to article Finalise eligibility reassessment decision.

Check eligibility - EI - hearing loss 0-25 years of age

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4 Consider eligibility for hearing loss 7
5 Priority eligibility decision – child younger than 7 8
6 Next steps 9

This article provides guidance for an access delegate and review officer to:

- check for an eligible hearing impairment for a person aged between 0 and 25
- consider NDIS eligibility under early intervention requirements
- make a priority eligibility decision for children younger than 7.

1 Recent updates

3 October 2024
Article title changed from Check evidence for a decision - Hearing Loss 0-25 years of age to Check eligibility – EI - hearing loss 0-25 years of age.

2 Before you start

You have

- read and understood Our Guideline - Applying to the NDIS (external) including sections: **Do you need early intervention?What about people aged between 0 and 25 with a hearing impairment?**
- read article Understand early intervention requirements
- followed guidance in article Make an access decision.

3 Check evidence

1. From **Access Decision** case, select **Decision** tab to view **Dashboard**.
2. At **Key Information**, check **Age** to confirm the person is 25 or younger.
3. Scroll to **Disability Evidence**.
4. Select **View** link to open auditory, neuropathy or hearing loss evidence, which must:
    - be from a specialist audiological assessment
    - be a hearing loss at least 25 decibels in either ear at 2 or more adjacent frequencies
    - show the hearing loss is likely to be permanent.
5. Review their hearing loss level with the current eligible standards for early intervention. If required, request further information.

4 Consider eligibility for hearing loss

A person aged 0 to 25 with an eligible hearing impairment will meet early intervention requirements.

5 Priority eligibility decision – child younger than 7

If a child younger than 7 is identified by Hearing Australia or an Early Childhood Partner as newly diagnosed with a hearing impairment, a priority eligibility decision must be made within 2 business days once the evidence has been validated.

For more information about action to take in this circumstance refer to article Consider priority eligibility decision.

6 Next steps

- To determine eligibility, continue to follow guidance in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes. The sub-criterion decisions will be made based on these evidence selections.
- For a person aged 26 or older with hearing loss, they may be eligible under disability or early intervention requirements. For further information read Our Guideline - Applying to the NDIS (external).

Check eligibility – EI – Impairment is likely permanent

SGP KP Publishing

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3 Evidence the impairment is likely to be permanent **6**
3.1 Review evidence of a permanent impairment 6
4 Next steps **7**

This article provides guidance for all NDIA staff and partners to:

- review evidence of a permanent impairment
- use this information to support the person to understand the eligibility requirements.

1 Recent updates

3 October 2024

- Article title changed from (EI) Check evidence for a decision – Impairment is likely to be permanent to Check eligibility – EI – Impairment is likely permanent.
- When we say EI in a title, we mean early intervention requirements. We've added this to help you identity which articles are for disability or early intervention requirements.

2 Before you start

You have:

- read and understood Our Guideline – Applying to the NDIS (external) section **How will early intervention benefit you?**
- read article Understand early intervention requirements.

3 Evidence the impairment is likely to be permanent

3.1 Review evidence of a permanent impairment

Review the available evidence to consider if the person has one or more impairments that is permanent or is likely to be permanent.

You will need to review the available evidence that says they are likely to have the impairment for their lifetime.

They might have some periods in their life where there is a smaller impact on their daily life, because their impairment may be episodic or fluctuate in intensity. Their impairment can still be permanent due to the overall impact on their life, and the likelihood that they will be impacted across their lifetime.

Even when their condition or diagnosis is permanent, you need to check if the impairment is permanent too. For example, a person may not be eligible if their impairment is temporary, still being treated, or if there are known, available and appropriate evidence-based clinical, medical or other remaining treatments options that are likely to remedy the impairment.

Generally, you'll consider whether an impairment is likely to be permanent after all available and appropriate treatment options have been pursued.

For more information, go to section **Do you have an impairment that's likely to be permanent?** in Our Guideline – Applying to the NDIS (external).

Early intervention requirements are just one of the eligibility requirements. To be eligible for the NDIS under early intervention, the applicant must also meet the age and residence requirements. Go to article Check eligibility – Age and residence requirements.

4 Next steps

If you are an access delegate:

- to determine eligibility, continue to follow guidance in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes.
- to check the timeframes to make a decision, follow guidance in article Check decision – Legislative timeframes.

Check eligibility – EI – likely to improve or reduce deterioration of functional capacity or strengthen informal supports

SGP KP Publishing

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3 Review evidence of functional capacity or informal supports 6
4 Next steps 7

This article provides guidance for all NDIA staff and partners to understand how to:

- review evidence of functional capacity or informal supports
- use this information to support the person to understand the eligibility requirements.

1 Recent updates

3 October 2024

- Article title changed from '(EI) Check evidence for a decision – Likely to improve or reduce deterioration of functional capacity or strengthen informal supports' to 'Check eligibility – EI – likely to improve or reduce deterioration of functional capacity or strengthen informal supports'.
- When we say EI in a title, we mean early intervention requirements. We've added this to help you identity which articles are for disability or early intervention requirements.

2 Before you start

You have read:

- and understood Our Guideline - Applying to the NDIS (external), section, **How will early intervention help you?**
- article Understand early intervention requirements.

3 Review evidence of functional capacity or informal supports

Review the available evidence to consider if early intervention supports are likely to help the person with at least one of the following:

- address the impact of their impairment on their ability to move around, communicate, socialise, learn, look after themselves and organise their lives
- prevent their functional capacity from getting worse
- improve their functional capacity
- support their informal supports, which includes building their skills to help them.

Before making an eligibility decision, you **must** find out about the person's functional capacity and informal supports. You do this by checking their application and evidence.
To make an eligibility decision about this early intervention requirement, you **must** consider:

- how early intervention will help the person
- their functional capacity
- their informal supports
- our legislation and guidance
- if we have enough evidence to decide or need more.

Early intervention requirements are just one of the eligibility requirements. To be eligible for the NDIS under early intervention, the applicant must also meet the age and residence requirements. Refer to Check eligibility – Age and residence requirements.

4 Next steps

If you are an access delegate:

- to determine eligibility, continue to follow guidance in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes.
- to check the timeframes to make a decision, follow guidance in article Check decision – Legislative timeframes.

Check eligibility – EI – likely to reduce future support needs

SGP KP Publishing

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3 Review evidence to determine the likelihood that future supports may be reduced 6
4 Next steps 7

This article provides guidance for all NDIA staff and partners to understand to understand how to:

- review evidence to determine the likelihood that future supports may be reduced
- use this information to support the person to understand the eligibility requirements.

1 Recent updates

3 October 2024

- Article title changed from '(EI) Check evidence for a decision – Likely to reduce future support needs' to 'Check eligibility – EI – likely to reduce future support needs'.
- When we say EI in a title, we mean early intervention requirements. We've added this to help you identity which articles are for disability or early intervention requirements.

2 Before you start

You have:

- read and understood Our Guideline – Applying to the NDIS (external) in section, **How will early intervention help you?**
- read article Understand early intervention requirements.
- evidence early intervention is likely to reduce future support needs

3 Review evidence to determine the likelihood that future supports may be reduced

Review the available evidence to consider if early intervention supports will mean the person is likely to need less NDIS supports in the future.

To determine if early intervention will help reduce the person's need for future supports, you need to look at:

- how their impairment might change over time
- how long they have had their impairment
- if there's been a significant change to their impairment
- if their needs are likely to change soon, such as if they are finishing school.

Early intervention requirements are just one of the eligibility requirements. To be eligible for the NDIS under early intervention, the person must also meet the age and residence requirements. Go to article Check eligibility – Age and residence requirements.

4 Next steps

If you are an access delegate:

- to determine eligibility, continue to follow guidance in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes
- to check the timeframes to make a decision, follow guidance in article Check decision – Legislative timeframes.

Check eligibility - EI - Supports will be NDIS supports

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4 Next steps 7

This article provides guidance for all NDIA staff and partners to review evidence to check if early intervention supports that are likely to benefit the person will be NDIS supports.

1 Recent updates

3 October 2024

- Updates to reflect legislation changes from 3 October 2024.
- Article title changed from (EI) check evidence for a decision – Support most appropriately funded by NDIS to Check eligibility - EI – Supports will be NDIS supports.
- When we say EI in a title, we mean early intervention requirements. We've added this to help you identity which articles are for disability or early intervention requirements.

2 Before you start

You have read and understood:

- Our Guideline - Applying to the NDIS (external) section, **Will the support you need be NDIS supports?**
- Article Understand early intervention requirements**.**

3 Review evidence

To decide if early intervention supports that will benefit the person will be NDIS supports, you must consider:

- the recommended early intervention supports
- if an appropriate treating professional has made the recommendation
- what is provided by mainstream and community supports
- if the supports are the services, items and equipment that are NDIS supports
- our legislation and guidance
- if we have enough evidence to decide or need more.

4 Next steps

To consider the other early intervention requirements, go to article Understand early intervention requirements.

If you are an access delegate:

- to make an access decision, continue to article Make an access decision – pre-legislation changes or Make an access decision – post legislation changes.
- to make an eligibility reassessment decision, continue to article Finalise eligibility reassessment decision.

Check eligibility - List A condition

SGP KP Publishing

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4.2 If the person has a List A condition 7
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5 Next steps 8

This article provides guidance for all NDIA staff and partners to check for a List A condition.

1 Recent updates

3 October 2024
Updates made to improve the knowledge article and merge information from the archived article Evidence Guide – List A conditions.
Article name changed from 'Check evidence for a decision – List A condition' to 'Check eligibility – List A condition.'

2 Before you start

You have:

- read Our Guideline – Applying to the NDIS (external)
- read article Understand disability requirements
- read article Understand early intervention requirements
- considered the age and residence requirements using article Check eligibility – Age and residence requirements.

3 Overview

To be eligible for the NDIS, the person must meet the requirements for:

- age
- residence
- disability, early intervention, or both.

When a person gives us evidence that they've been diagnosed with one or more conditions on List A: Conditions that are likely to meet the disability requirements (external) they'll likely meet the **disability requirements.**

4 Check for a List A condition

4.1 How to find evidence of a List A Condition?

A person may inform us that they have a **List A** condition, or we might identify it when reviewing their disability evidence.

Before making an eligibility decision, make sure you review the application and any provided disability evidence for any diagnosed List A: Conditions that are likely to meet the disability requirements (external).

4.2 If the person has a List A condition

If there's evidence of a List A condition, the disability requirements are met.

You also need to think about the early intervention requirements. Go to article Understand early intervention requirements.

4.3 If the person doesn't have a List A condition

If the person **doesn't** have a List A condition, think about all the disability and early intervention requirements using articles:

- Understand disability requirements
- Understand early intervention requirements.

5 Next steps

If you're an access delegate:

- to make an access decision, continue to article Make an access decision – pre-legislation changes or Make an access decision – post legislation changes.
- to make an eligibility reassessment decision, continue to article Finalise eligibility reassessment decision.

Check eligibility - List B condition

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4.2 If the person has a List B condition 7

4.3 If the person doesn't have a List B condition 7

5 Next steps 8

This article provides guidance for all NDIA staff and partners to check for a List B condition.

1 Recent updates

3 October 2024

Updates made to improve the knowledge article and merge information from the archived article Evidence Guide – List B conditions.

Article name changed from Check evidence for a decision – List B condition to Check eligibility – List B condition.

2 Before you start

You have:

- read Our Guideline – Applying to the NDIS (external)
- read article Understand disability requirements
- read article Understand early intervention requirements
- considered the age and residence requirements using article Check eligibility – Age and residence requirements.

3 Overview

To be eligible for the NDIS, the person must meet the requirements for:

- age
- residence
- disability, early intervention, or both.

When a person gives us evidence that they've been diagnosed with one or more conditions on List B: Conditions that are likely to result in a permanent impairment (external), they'll meet **some** of the **disability requirements** and **early intervention requirements**.

4 Check for a List B condition

4.1 How to find evidence that a person has a List B condition?

A person may inform us that they have a **List B** condition, or we might identify it when reviewing their disability evidence.

Before making an eligibility decision, make sure you review the application and any disability evidence for any diagnosed List B: Conditions that are likely to result in a permanent impairment (external).

4.2 If the person has a List B condition

If the person has evidence of a list B condition, **only some** of the disability and early intervention requirements are met.

The following disability requirements are met:

- the person has a disability that us caused by one or more impairments (s24(1)(a)).
- the person's impairment or impairments are likely to be permanent (s24(1)(c)).

The following early intervention requirement is met:

- the person has one or more impairments that are likely to be permanent (s24(1)(a)).

You'll need to then think about the remaining disability and early intervention requirements using articles:

- Understand disability requirements.
- Understand early intervention requirements.

4.3 If the person doesn't have a List B condition

If the person **doesn't** have a List B condition, think about all of the disability and early intervention requirements using articles:

- Understand disability requirements
- Understand early intervention requirements.

5 Next steps

If you're an access delegate:

- to make an access decision, continue to article Make an access decision – pre-legislation changes or Make an access decision – post legislation changes.
- to make an eligibility reassessment decision, continue to article Finalise eligibility reassessment decision.

Check eligibility - List D condition

SGP KP Publishing

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5 Next steps **8**

This article provides guidance for all NDIA staff and partners to check for a List D condition (children younger than 7 only).

1 Recent updates

3 October 2024
Updates made to improve the knowledge article and merge information from the archived article **Evidence Guide – List D conditions**.
Article name changed from Check evidence for a decision – List D condition to Check eligibility – List D condition.

2 Before you start

You have:

- read Our Guideline – Applying to the NDIS (external)
- read article Understand disability requirements
- read article Understand early intervention requirements
- considered the age and residence requirements using article Check eligibility – age and residence requirements.

3 Overview

To be eligible for the NDIS, the person must meet the requirements for:

- age
- residence
- disability, early intervention, or both.

When a family or carer gives us evidence that a child younger than 7 has been diagnosed with one or more conditions on List D (external), they will meet the **early intervention** requirements.

4 Check for a List D condition

4.1 How to find evidence if a child younger than 7 has a List D condition?

A family or carer may inform us that a child younger than age 7 has a **List D** condition or we might identify it when reviewing their disability evidence.

Before making an eligibility decision, make sure you review the application and any provided disability evidence for any diagnosed List D conditions (external).

4.2 If the person has a List D condition

If there is evidence of a list D condition, the early intervention requirements are met.

You also need to consider the disability requirements. Go to article Understand disability requirements.

4.3 If the person doesn't have a List D condition

If the person is **not** a child younger than 7 with a List D condition, consider all of the disability requirements and early intervention requirements using articles:

- Understand disability requirements.
- Understand early intervention requirements.

5 Next steps

If you are an access delegate:

- to make an access decision, continue to article Make an access decision – pre-legislation changes or Make an access decision – post legislation changes.
- to make an eligibility reassessment decision, continue to article Finalise eligibility reassessment decision.

Check eligibility – Terminal illness

SGP KP Publishing

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4 Identify if the applicant may have a terminal illness 7
5 Check for evidence the applicant needs palliative care supports 8
6 Make an eligibility decision for an applicant with a terminal illness 9
7 Next steps 10

This article provides guidance for an access delegate and review officer to:

- understand the priority access pathway for people with terminal illness
- identify if the applicant may have a terminal illness
- check for evidence the applicant needs palliative care supports
- make an eligibility decision for an applicant with a terminal illness.

1 Recent updates

3 October 2024

Article title changed from Check evidence for a decision – terminal illness to Check eligibility – Terminal illness

2 Before you start

You have read and understood:

- Our Guideline – Applying to the NDIS (external) including section **Will you likely need NDIS supports for your lifetime?**
- Our Guideline – Mainstream and community support (external)
- article Understand palliative care
- article Understand disability requirements
- article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes
- article Guide – Conversation style guide and appendix B in sections **Sensitive conversations** and **Explaining your access or planning decisions**.

You have reviewed:

- any evidence of informal, mainstream or community palliative care supports.

3 Priority access pathway for people with terminal illness

NDIS applications from people with terminal illness are submitted through the priority access pathway. For more information, read article Request priority eligibility decision.

The Priority Health Access Team will make the eligibility decision within 5 days.

If an access met decision is made, the new participant will be streamed to the Aged Care and Hospital Interface branch if they have palliative support care needs. The Aged Care and Hospital Interface branch will develop the participant's plan within 30 days.

4 Identify if the applicant may have a terminal illness

In a person's NDIS application, their primary disability may indicate there is an underlying health condition which may reduce their quality or expected length of life. For example, if their disability is described as an acquired brain injury.

The person may also specify that they have a terminal illness. Terminal illnesses may include many different types of cancers, chronic obstructive pulmonary disease (COPD), or end-stage kidney or liver diseases.
Other illnesses may also be terminal but have a relatively long life expectancy. Conditions including Huntington's Disease, Parkinson's Disease and dementias may be terminal, but applicants with these conditions may not require palliative care supports at the time of their access application.

Note: These conditions do not automatically mean the applicant is suitable for the priority planning pathway.

Information in an NDIS application may indicate the person has a terminal illness and may need palliative care supports funded by the health system. This information might include:

- a prognosis category, such as 'guarded' or 'poor'
- time-framed prognosis, for example 3 to 18 months to live
- terminal or end-stage illness
- staged health condition, for example stage 3, 4 or 5
- no longer suitable for active treatment – treatment is for symptom management
- reference to pain management related to comfort
- references to past treatments, for example chemotherapy, immunotherapy, radiotherapy
- organ failure, for example lung, heart, liver, or kidney
- high levels of nursing support
- specialist or community palliative care team involvement.

5 Check for evidence the applicant needs palliative care supports

Before making an eligibility decision for a disability caused by a terminal illness, you must make sure the applicant meets the age and residence requirements. Learn more in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes.

You then need to understand any evidence of palliative care support needs.

Information about current treatments, goals of care, and stage of illness can help you understand the applicant's support needs. A suitably qualified treating health professional must provide this evidence.

Evidence may include information about:

- current and future treatments designed to make people comfortable or slow disease progression rather than make them better
- anticipated outcomes of the treatments
- evidence of the stage of disease progression
- level of care and clinical supports required
- current and future goals of care.

You may need to request further information from a treating health professional.

Talking about dying and terminal illness can be hard. But it's important to talk about it so people can be prepared.

To help you prepare to talk with an applicant with a terminal illness, go to article Navigate conversations about life-limiting conditions.

6 Make an eligibility decision for an applicant with a terminal illness

A specialised access team, called the Priority Health Access Team, makes decisions about access eligibility for people with terminal illness and disability.

If you identify an applicant may have a terminal illness, you must request advice from the Technical Advice and Practice Improvement Branch (TAPIB). This is regardless of the proposed eligibility decision. To learn more, go to Requesting Advice or article Create a technical advice case.

Before an eligibility decision is made, we'll need to understand the applicant's disability and its impact on their life.

Information in the technical advice case helps TAPIB understand the applicant's situation.

This could include information about if the applicant:

- is applying to the NDIS because of an identified terminal illness
- is applying to the NDIS because of another reported impairment that's a direct result of a terminal illness or treatment
- has declining function because of the progression of a terminal illness
- has palliative support needs, for example supports intended for quality-of-life purposes rather than improving social and economic participation
- requires a high level of skilled clinical support, for example palliative pain management or specialist nursing care.

Note: The free-text field in the technical advice case has a limit of 255 characters. You can use these as examples to provide a brief summary of the participant's situation. Follow the guidance in article Create a technical advice case to complete the case and provide supporting information.

7 Next steps

1. To determine eligibility after you have received advice from TAPIB, continue to follow guidance in article Make an access decision - pre-legislation changes or article Make an access decision – post-legislation changes.
2. If the participant is eligible for the priority pathway and an access met decision is made, the participant will be streamed to the Aged Care and Hospital Interface branch. The Aged Care and Hospital Interface branch will develop the participant's plan within 30 days.

Understand early intervention requirements

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This article provides guidance for all NDIA staff and partners to understand eligibility under the early intervention requirements.

1 Recent updates

3 October 2024
Updates to reflect legislation changes from 3 October 2024:

- applicants may now meet both disability and early intervention requirements, instead of just one.
- the requirements for early intervention have changed from early intervention you need is most appropriately funded by the NDIS to Early intervention supports that are likely to benefit you will be NDIS supports.

2 Before you start

You have:

- read Our Guideline – Applying to the NDIS (external) including section, **Do you need early intervention?**
- read article What evidence of disability is required?
- read article Check eligibility – age and residence requirements

3 Overview

To be eligible for NDIS, the person must meet the requirements for:

- age
- residence
- disability, early intervention, or both.

The purpose of early intervention is to lessen the impact of a person's impairment by providing support at the earliest possible stage.

Early intervention support is intended to benefit a person by reducing their future need for supports and by strengthening informal supports. For example, building the capacity of their carer.

Early intervention is for both children and adults and may be required only for a short time.

A person may not need supports for life, so their treating professional or early childhood partner will advise us how early intervention could benefit the person or child.

4 Early intervention requirements

To meet the **early intervention** requirements, we must have evidence of **all** of the following:

- they have an impairment that's likely to be permanent, or they're a child younger than 6 with developmental delay
- early intervention supports are likely to reduce their future support needs
- early intervention supports are likely to benefit them
- the early intervention supports they need are NDIS supports.

4.1 Check eligibility for early intervention requirements

Use these articles to check evidence for a decision:

- Check eligibility – EI – impairment is likely permanent.
- Check eligibility – EI – likely to reduce future support needs.
- Check eligibility – EI – likely to improve or reduce deterioration of functional capacity or strengthen informal supports.
- Check eligibility – EI – supports will be NDIS supports.

4.2 Additional considerations

Use these articles before you check evidence for a decision:

- if the child is younger than 7, check if there is evidence of a condition on List D. Go to article Check eligibility – List D condition.

  Note: A child is likely to meet the early intervention requirements if they provide evidence of their diagnosis.
- check if the person is diagnosed with a condition on List B, Go to article Check eligibility – List B condition.

  Note: A person is likely to meet **one** of the early intervention requirements if they provide evidence of their diagnosis.
- if the child is younger than 6, check if they have a developmental delay. Go to article Check eligibility – EI – developmental delay
- if the person if aged between 0 and 25 with a hearing impairment, go to article Check eligibility – EI – hearing loss 0-25 years of age.

5 Next steps

To consider the disability requirements, go to article Understand disability requirements.

If you are an access delegate:

- to make an access decision, continue to article Make an access decision – pre-legislation changes or Make an access decision – post legislation changes.
- to make an eligibility reassessment decision, continue to article Finalise eligibility reassessment decision.

Finalise eligibility reassessment decision

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8 Next steps 13

This article provides guidance for an access delegate to:

- complete a check for procedural fairness
- finalise the eligibility reassessment decision
- complete a manual procedural fairness check
- complete the eligibility reassessment (ER) outcome tab and contact participant to let them know the eligibility reassessment decision
- next steps for access met, disability change outcomes, or once the QDO approves a revoke outcome.

1 Recent updates

3 October 2024
Guidance updates:

- to reflect legislation changes effective from 3 October 2024
- new section added Complete a manual procedural fairness check when the decision is to revoke
- additional detail added to Finalise the eligibility reassessment decision
- removed section Create a reminder to revoke access on SAP CRM in 28 days, as this is completed by a quality development officer.

2 Before you start

You have:

- read about eligibility in Our Guideline – Applying to the NDIS (external) and Our Guideline – Leaving the NDIS (external)
- checked if there is a request to voluntarily leave the NDIS. If so, close out the Eligibility Reassessment case and create a Leaving the NDIS case. For more information see article Understand the leaving case. Assign this to the My NDIS contact.
- accepted an eligibility reassessment case

You have read articles:

- When to refer the participant for an eligibility reassessment
- Understand procedural fairness and eligibility reassessment requirements
- Contact attempts and unable to contact in an eligibility reassessment case.

3 Complete a check for procedural fairness

1. Go to **ER Outcome** tab.
2. Complete the **Procedural Fairness Checklist**.

   Note: You can't commence the eligibility reassessment decision until the **Procedural Fairness Checklist** has been completed. For more information see article Accept a case from the eligibility reassessment queue and complete the procedural fairness check.

Note: If the eligibility reassessment outcome is to revoke access, the manual procedural fairness check will also need to be completed. See section **Complete a manual procedural fairness check**.

4 Finalise the eligibility reassessment decision

It is the participant's responsibility to provide evidence that they continue to meet the eligibility requirements.

1. Review the **Eligibility Check** tab to understand the background of the eligibility reassessment, including:
   - why the previous access delegate progressed the eligibility reassessment case.
   - the eligibility criteria we were checking the participant continues to meet.
2. If the **Eligibility Check** tab indicates the participant may not meet the:
   - **residence requirements** – assess the residence, disability and early intervention criteria.
   - **disability and early intervention requirements** – assess the disability and early intervention criteria.

   Note: If the participant joined the NDIS under a NSW prescribed program, only consider the disability and early intervention requirements. Do not consider the residence requirements.
3. To finalise the eligibility reassessment decision, review all information and evidence on the participant's **Person Account**, relating to eligibility. If there isn't clear evidence the person continues to meet all eligibility criteria, their eligibility needs to be reassessed.
4. Check for outstanding evidence related to the participant's eligibility including in the:
   - **Enquiry** inbox. Check and action any relevant emails
   - eligibility reassessment case under **Evidence** or **Documents** tabs
   - **Person Account** under **Document** or **My Profile** then **Evidence** tabs
   - related enquiry case (if relevant)
   - participant's **SAP CRM** record **Inbound Documents** (if relevant).
5. If the evidence isn't already in the eligibility reassessment case, you must link it to the case. Use article [Upload evidence to support an eligibility reassessment (ER) case]() section **Upload evidence to support the eligibility reassessment case**.

Note: You don't need to upload documents in **SAP CRM** to **PACE**.

6. There will be three possible outcomes for the eligibility reassessment. Use [Our Guideline – Applying to the NDIS (external)]() section **Appendices**, to either:
   - maintain the participant's status as eligible for the NDIS. Continue to section **Complete the ER Outcome tab and contact participant to let them know the eligibility reassessment decision**.
   - change the eligibility criteria. Continue to section **Complete the ER Outcome tab and contact participant to let them know the eligibility reassessment decision**.
   - revoke the participant status. Continue to section **Complete a manual procedural fairness check**. **Note**: you cannot revoke a participant due to a lack of information or evidence if they have not been given reasonable opportunity to respond.

   Note: Decisions for participant's who are living with **terminal illness** must only be completed by delegates in the Priority Health Access team.

Note: If TAPIB advice is required, go to article [Create a technical advice case]().

5 Complete a manual procedural fairness check

If the outcome is to revoke the participant status, you **must** complete a manual procedural fairness check. Start at section **Check correspondence.**
If you are not revoking the participant's status, go to section **Complete the ER Outcome tab and contact participant to let them know the eligibility reassessment decision**.

5.1 Check correspondence

Check the participant, their nominee or child representative was sent correspondence to notify them about the eligibility reassessment.

1. Check whether the participant has a correspondence nominee or child representative. Go to the participant's **Person Account**. Select **Relationships**, then **Authorised Reps**. Any child representative or nominee roles will appear here. For more information go to article Check consent, nominee, child representative or self-representation authorities.
2. If the participant has a child representative or correspondence nominee, navigate to the representatives **Person Account**. Otherwise stay in the participant's **Person Account**.
3. Select **Documents** tab.
4. Review the eligibility reassessment correspondence sent to the participant. Check either the **Letter - Eligibility Reassessment Evidence Request** or **Letter – Eligibility Reassessment opportunity to respond** were sent. If a letter was not sent, notify your team leader.
5. Open the correspondence and review whether the participant had at least 28 days from the date of the letter to provide information.

5.2 Check contact attempts

1. Go to the **Eligibility Reassessment** case.
2. Select **Case Activity** tab. Select **Activity History**.
3. Check the correct number of contact attempts were made to notify the participant of the eligibility reassessment. See article Contact attempts and unable to contact in an eligibility reassessment case.
4. If one or more phone call attempts have not been completed, discuss this with your team leader.

5.3 Check for outstanding enquiries

Check if the participant has any outstanding eligibility reassessment enquiries.

1. Go to **Person Account**, **Cases** tab.
2. Select **Cases**, then **All Cases**.
3. In the **Case Record Type** column, check for any open **Enquiry** cases created after the eligibility reassessment commenced.
4. Action any eligibility reassessment enquiries before proceeding.

5.4 Check evidence extension requests

Check if the participant has any outstanding evidence extension requests.

1. Go to **Person Account**, **Cases** tab.
2. Select **Cases**, then **All Cases**.
3. In the **Case Record Type** column, check for extension of time requests by reviewing **Enquiry** and **Evidence Extension** cases created after the eligibility reassessment commenced.

Note: NCC may create enquiry cases for extension requests.

4. If there is an outstanding evidence extension request, continue to article Action evidence extension request for eligibility reassessment case.

6 Complete the ER Outcome tab and contact participant to let them know the eligibility reassessment decision

Make sure you're confident in your final decision and enter it accurately into the **ER Outcome** tab.

Do not select **Back** at any point, as this may prevent the case from progressing. If you need to make changes to the decision after you have entered it into the **ER Outcome** tab, contact your team leader for support. They will check whether **Back** can be selected, and if not, raise an ICT ticket to resolve this.

1. Check the participant has a my NDIS contact assigned in PACE using article Update the My NDIS Contact. A PACE task won't begin if there isn't a my NDIS contact assigned, which means any updates won't be picked up until their next check-in.
2. Select **ER outcome** tab and complete the steps.
3. At **Impairment assessment** select the primary and secondary impairments.
4. At **Residence Section 23 Sub Criterion** answer all questions.

Note: At **Is the applicant currently living in Australia?** and **Is the applicant an Australian citizen or a current eligible visa holder?** Select **N/A** when the participant may not meet the residence requirements **and** they joined under a NSW prescribed program.

5. If the participant is 7 years or older complete **Disability Section 24 Sub Criterion**. If not, go to step 7. The questions will automatically generate from the answer to the earlier question **Does the reassessment impairment belong to List A, B or D?**
6. All eligibility criteria sections must be answered. If you select **No** for any criteria, select the correct justification from the dropdown options. If section 24(1)(b) is **not met**, then the remaining criteria will not be met.

Note: Due to NDIS Amendment (Getting the NDIS Back on Track No. 1) Bill 2024, section 25(3) and section 24(1)(e) will not be correctly reflected in PACE. You will still need to select whether this requirement is met or not by selecting Yes or No in the System. You will be advised later in this article to record an Internal Note explaining that you have applied the correct legislation.

7. At **The participant is likely to require lifetime supports under the NDIS** select **Yes** or **No**.

Note: Due to NDIS Amendment (Getting the NDIS Back on Track No. 1) Bill 2024, section 24(1)(e) will not be correctly reflected in the System. You will still need to select whether this requirement is met or not by selecting Yes or No in PACE. You will be advised later in this article to record an Internal Note explaining that you have applied the correct legislation.

8. If the participant is younger than 7 complete **Early Intervention Section 25 Sub Criterion**. All eligibility criteria sections must be answered. If you select **No** for any criteria, select the correct justification from the dropdown options. If section 25(1)(a) is not met, then the remaining criteria will not be met.

Note: Due to NDIS Amendment (Getting the NDIS Back on Track No. 1) Bill 2024, section 25(3) will not be correctly reflected in PACE. You will still need to select whether this requirement is met or not by selecting Yes or No in the System. You will be advised later in this article to record an Internal Note explaining that you have applied the correct legislation.

9. At **The participant has one or more identified intellectual, cognitive, neurological, sensory or physical impairments that are, or are likely to be permanent; or one or more identified impairments that are attributable to a psychiatric condition that are, or are likely to be, permanent** select **Yes** or **No**.

Note: If you answer Yes, sub criteria 2, 3, sub criteria 4 will not appear.

10. Review the recorded **Sub Criterion and Overall Criteria Summary**. Depending on whether the outcome is maintain, change or revoke, additional pages will populate.

Note: If the decision is not correct, contact your team leader for support.

11. If you are updating the primary impairment, complete **Access Disability Change**. Updating the **Primary Impairment** will update the person account automatically. The existing primary impairment will become a secondary impairment in the person account. If you need to update the secondary impairment, update this in the person account. See article Update a person account. Select **Next**.
12. If the outcome is to:
    - **revoke**, continue to step 13.
    - **access met** or **disability criteria change**, continue to step 14.
13. Record the evidence used to make the revoke decision using article Log an activity or internal note. Use the below template.

Template for evidence considered for revoke outcome

I have reviewed the following documents as part of the eligibility reassessment.

The following documents are available in the person's PACE record:

<Type of document> <from/with> <Title and person's name> <Profession or relationship> dated **<date of document**>. Evidence located in **<SAP CRM/SAP CRM and PACE>.**

14. Review the **Summary** information. Select **Next**.

    Note: If the decision is to **revoke**, then the **ER Outcome** cannot be completed by the delegate. When you select **Next** at the **Summary** screen, the case will route to the **ER Revocation Queue** for a quality development officer (QDO). The QDO will review the case and either approve to revoke access or request an adjustment. The QDO will send the case back to you to finalise the revocation process or adjust the decision.

7 Next steps for access met, disability change outcomes, or once the QDO approves a revoke outcome

1. For a **revoke** outcome, if the QDO send an adjustment request, continue with article Review the quality feedback (QDO). Otherwise continue to step 2.
2. In the **ER Outcome** tab, review the **Decision**. Select **Next**.
3. Review the **Justification**. If the justification is:
   - not correct, contact your team leader for support.
   - correct, select **Next**, then **Evidence**.
4. Review the **Evidence**. Select **Next** and complete the **ER Outcome**.
5. Record an internal note using article Log an activity or internal note. Use the below template:

Eligibility Reassessment legislative decision

The Eligibility Reassessment was valid for a decision on **<DD/MM/YYY>**. The **<Eligibility Check/ER Outcome>** decision has been made under NDIS Amendment (Getting the NDIS Back on Track No. 1) Bill 2024. Section 24(1)(e) and section 25(3) of the sub criterion questions incorrectly reflect the NDIS Act 2013 legislation. All external communication including letters and phone calls reflect the correct 2024 legislation.

6. Contact the participant to let them know the **Eligibility Reassessment Decision**, and send them a letter with the decision. Use article Contact the participant to explain the outcome of their eligibility reassessment.
7. If the participant's status is:
   - **maintained or changed**, they will continue to be a NDIS participant. No further action is required. **End of process**.
   - **revoked**, they are no longer eligible for the NDIS. A **Leaving the NDIS** case will automatically be created and routed to the my NDIS contact to complete the final checklist. The letter will inform the participant that this will take effect in 28 days. Continue to step 8.
8. Where the participant has an active record you **must** check for a person record in **SAP CRM** and revoke access in **SAP CRM** if there is. You can only complete this 28 days after the decision is made as revoking access in SAP CRM will immediately cease access to funded supports.

8 Next steps

1. If the participant has been revoked, revoke access on SAP CRM after 28 days.

Understand procedural fairness and eligibility reassessment requirements

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This article provides guidance for an **access assessor** to:

- understand procedural fairness
- consider the eligibility requirements
- consider the participant's impairment
- consider the assessment summary.

To complete the **Eligibility Check** in PACE, you need to understand these requirements.

When we talk about contacting a participant, we mean the participant or their authorised representative.

1 Before you start

You have read:

- **Are you eligible for the NDIS?** in Our Guideline – Applying to the NDIS
- **What happens if we check your eligibility?** in Our Guideline – Leaving the NDIS.

You have been asked to:

- draw down an eligibility reassessment referral
- complete an eligibility check
- decide if an eligibility reassessment should commence
- decide if the participant needs an access status change.

2 Understand procedural fairness

You will complete an **Eligibility Check** in PACE. The Eligibility Check will help you decide if an eligibility reassessment should commence. The **Procedural Fairness Checklist** is the first part of the check.

The procedural fairness check will automatically check who has progressed the case and created the referral. If you approved the participants access, you must select Yes when prompted and the case will be routed back to the eligibility reassessment queue.

3 What is procedural fairness?

Procedural fairness is about making sure we give participants a reasonable opportunity to have their say and provide us with evidence about their situation. It is also about making sure our decisions are fair and unbiased. When we say fair and unbiased, we mean our decisions are made by someone who wouldn't benefit from the decision or be impacted by it.

4 What is the purpose of the procedural fairness checklist?

The checklist has questions to make sure you are an independent delegate. This is how we make sure we our decisions are fair and unbiased.

You aren't an independent delegate if you have:

- a personal interest in the participant's status, or
- a personal relationship with the participant (outside the NDIA), or
- been involved in making the original eligibility decision or any planning decisions.

5 What about manual procedural fairness checks?

Procedural fairness is also about:

- being transparent with the participant
- giving them reasonable opportunity to provide information, and to present a case to support their continued eligibility.

There are steps you will take to make sure we follow procedural fairness. That is what we mean when we say manual procedural fairness checks.

6 Has the My NDIS contact been able to contact the participant?

This is an important manual procedural fairness check. The My NDIS contact will record their contact with the participant in PACE. You will check PACE. If the My NDIS contact is unable to contact the participant, do not make an eligibility reassessment referral.

If the My NDIS contact made an eligibility reassessment referral without contacting the participant:

- do not commence an eligibility reassessment
- close the eligibility reassessment case – read article **Action if ER not required** to learn more.

If the My NDIS contact was able to contact the participant, continue with the eligibility reassessment. Do this even if **you** are unable to contact them.

7 Review information and evidence

You will make sure we follow procedural fairness by thoroughly reviewing existing information and evidence.

Some sources of existing information include:

- conversations about the participant's situation recorded in PACE
- any relevant documents on the participant's record
- medical or clinical reports, diagnostic and assessment information
- service provider reports and assessments such as progress reports
- information provided with the participant's access to the NDIS
- early childhood partner documents
- information from family members and carers.

8 Consider the eligibility requirements

After you complete the **procedural fairness checklist**, you will consider the eligibility requirements to complete the **impairment assessment**. PACE will pre-populate responses for each eligibility requirement based on the:

- **Referral checklist**
- **Impairment assessment.**

This means some responses will already be pre-populated in PACE.

9 Consider residence requirements

Read **Do you meet the residence requirements** in Our Guidelines – Applying to the NDIS. This will help you consider the residence requirements if you need to.

10 Consider early Intervention requirements

Read **Do you need early intervention** in Our Guidelines – Applying to the NDIS to learn more. This will help you consider the early intervention requirements if you need to.

11 Consider disability requirements

Read **Do you meet the disability requirements** in Our Guidelines – Applying to the NDIS. This will help you consider the disability requirements if you need to.

12 Consider the participant's impairment

An **impairment assessment** is another part of the **eligibility check**. The **impairment assessment** asks you to consider if the reassessment impairment belongs to List A, B or D. You will use the **Appendices** in Our Guidelines – Applying to the NDIS to consider if the impairment belongs to List A, B or D.

13 Consider the assessment summary

The last part of the **eligibility check** is the **assessment summary.** This part of the eligibility check asks you to consider:

- **Has the participant's primary impairment changed?**
- **Have changes been made to the secondary impairments listed in the Participant's record?**

You will answer **Yes** or **No** and **select the reassessed impairment, if needed.** Your responses will be based on your thorough review of the participant's information and evidence.

PACE will pre-populate **Yes** or **No** for **primary disability change** or **access status change**. The pre-populated response is based on the answers you entered about the participant's impairment and eligibility.

14 Next steps

You will:

- make a decision about the participant's eligibility
- use the **eligibility check** tab in PACE to record your decision making.

To learn more about using the **eligibility check** tab in PACE read articles:

- **Draw down a referral and check procedural fairness for an ER case**
- **Review and link participant evidence to the eligibility reassessment case**.

Make an access decision - post legislation changes

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13 Next steps 21

This article provides guidance for an access delegate (assessor) to:

- check legislative timeframes
- complete disability evidence
- request further information
- approve or override the streaming case
- record access decision
- submit decision for quality check
- complete access decision correspondence
- notify early childhood partner of access not met decision (developmental delay only)
- check disabilities tab (access met only)
- assign plan approval case (Motor neurone disease only).

The legislation you need to use automatically populates in the access decision case based on what is selected in the access request case.

Go to article Complete pre-assessment of access decision to decide which version of the legislation and article you need to use to make an access decision.

Use this article if you need to use the **post-legislation changes** version of the legislation to make an access decision.

1 Recent updates

3 October 2024
Updated guidance to:

- reflect legislation changes from 3 October 2024
- Update title from Make access decision to make it clear to use this article when making a decision using the post-legislation changes version of the legislation.
- Remove step to consider if the person is from a defined program as defined programs no longer apply.
- To be eligible under the disability requirements, there must be evidence the person requires NDIS supports for their lifetime. NDIS supports are the services, items and equipment that can be funded by the NDIS.
- To be eligible under the early intervention requirements, there must be evidence that supports that are likely to benefit the person will be NDIS supports.
- If the age and residence requirements are met, you must consider both the disability and early intervention requirements. The person may meet both, rather than only one or the other.
- If eligible, you must select the impairments that met the requirements for disability, early intervention requirements or both. Impairments include intellectual, cognitive, neurological, sensory, physical, or impairments to which a psychological disability is attributable. Or you can select developmental delay, and you do not need to select impairments.
- New step to advise the justice liaison officer (JLO) when requesting more evidence (if relevant)
- New step to notify early childhood partner of access not met decision (developmental delay only)
- New step to assign plan the approval case (Motor neurone disease only).

2 Before you start

You have:

- completed the pre-assessment and checked you need to use the **post-legislation changes** version of the legislation to make an access decision using article Complete pre-assessment for an access decision
- checked there is evidence of identity or an internal note to explain why it can't be provided
- checked the application is complete with evidence of consent to apply, age, residence and disability
- read article Check eligibility – age and residence requirements
- read article Understand disability requirements
- read article Understand early intervention requirements.

3 Check legislative timeframes

You have **21 days** to make a decision or request further information.

When a request for further information has been made, you have **14 days** from the date that the last information or report was received to make a decision.

1. Use article Check decision – legislative timeframes to check if your decision or request for further information will be outside legislative timeframes. If:
    - inside legislative timeframes: go to section **Complete disability evidence**.
    - outside legislative timeframes: use article Check decision – legislative timeframes to record an internal note. Then go to section **Complete disability evidence**.

4 Complete disability evidence

Links to evidence documents in the access request case will display here.

1. At **Have you verified the Evidence of Disability?**, select **Yes**. This is based on section **Check evidence of disability** in article Complete pre-assessment of access decision.
2. At **Select assessed Impairment**, enter text into the field and a list will display. Select relevant option.
3. Make a note of the assessed impairment name and ICD code. You will need this for section **Decision Main Criteria**.
4. At **What evidence was used to confirm the Impairment?**, select the appropriate option.

Note: **Defined Program** no longer populates the access decision.

5. At **Does the applicant's impairment belong to List A, B or D?**, select the appropriate option.

Note: This no longer populates the access decision.

6. For more information about list conditions, go to articles:
   - Check eligibility – List A condition
   - Check eligibility – List B condition
   - Check eligibility – List D condition.
7. Select **Add** next to **Impairment Assessment** to record additional impairments. If an:
   - **access met** decision, add all impairments that meet eligibility requirements
   - **access not met** decision, add all reported impairments.

5 Request further information

1. Decide if you need more information to make an access decision. Only request more information if:
   - the application is complete
   - you need more evidence after receiving the applicant's disability evidence.
2. If the applicant is a child with developmental delay turning 6 within the next 90 days, ask your team leader before requesting more information.

In this situation, it may be more appropriate to make an access not met decision. For an access request, the child must be younger than 6 on the day the access decision is made. For an internal review, the child must have been younger than 6 at the time of the access not met decision. This reduces the risk of the child turning 6 before an access decision is made.

3. At **Do you require further information from the applicant?**, select **Yes** or **No**. If:
   - **No**, select **Next**, then go to section **Approve or override streaming case**.
   - **Yes**, continue to next step.
4. At **Enter the Required Information below**, copy relevant templates from Templates for requesting further information to make a decision – Post-legislation changes.
5. Select **Next**.
6. Select one or more of the criteria for the requested information from the provided tick boxes.
7. Select **Next**.
8. Select **Done**.
9. Select **Next**.
10. At **Do you want to preview the document before sending it?**, select **Yes**.
11. Complete **Select a Recipient for preview** to preview the letter.
12. If correct, select **Next**. If incorrect, select **Previous** to update the fields that populate the letter.
13. Select **Submit Correspondence**.
14. Select **Next**. A letter will automatically be sent to the applicant or their authorised representative to request further information. The access decision case is automatically closed.

5.1 Check correspondence

1. From the **Person Account** case, select the **Documents** tab.
2. Check for **Further Information Requested** letter. **Category** will be **Outbound Correspondence**. If:
   - **Yes**, if there is a justice liaison officer, go to section **Notify the justice liaison officer (JL) (if relevant)**. If not, go to section **Next steps**.
   - **No**, go to next step.
3. Submit a Report a defect with PACE, my NDIS Provider or Participant Portal, or my NDIS App ticket
4. Share the ticket with your team leader and assistant director.

5. If there is a justice liaison officer, go to section **Notify the justice liaison officer (JL) (if relevant)**. If not, go to section **Next steps**.

5.2 Notify the justice liaison officer (JLO) (if relevant)

5.2.1 Create the enquiry case

1. Create an **Enquiry** case and reassign to the **MyNDIS Contact** using article [Create an enquiry case.]
2. At **Requested By**, select **General Enquiry Only**.
3. At **Case Origin**, select **Internal**.
4. At **Enquiry Type**, select **Access**.
5. At **Category**, select **Access Request**.
6. At **Sub Category**, select **Escalation Enquiry**.
7. In **Enquiry Notes**, use the following template:

Further information requested to support **<Applicant's name>** NDIS application.

More information is needed about <permanency/functional capacity/lifetime supports/future support needs/whether the NDIS is the most appropriate service> of <Impairment/Impairments>. <Reason this information is being requested>.

Refer to Request for More Evidence letter in the person account for more information.

Support the applicant to provide more evidence by **<Date>** (90 days).

8. At **Enquiry Outcome** select **Keep enquiry open - Do not re-assign**. This will allow you to assign the case to the JLO later with an email notification.

5.2.2 Assign the enquiry case

1. From the **Enquiry** case, select the **Change Owner** icon next to the current **Case Owner**.
2. At the **Search Users** free text field, search for the **MyNDIS Contact**.
3. Select the tick box next to **Send notification email**.
4. Select **Change Owner**.
5. Go to section **Next Steps**.

6 Approve or override the streaming case

The streaming case is critical to make sure the Typical Support Package (TSP) is generated for eligible applicants, and they're assigned to the correct team. This is important to make sure they receive the support level they need to engage with the NDIS.

Generally, the streaming case is completed by a local area coordinator, early childhood partner or planner and the case routes to an access delegate for approval.

1. Check for a streaming case. A streaming case **must** be completed and approved **before** completing the access decision case. If:
    - **Yes**, continue to next step.
    - **No**, create a streaming case. Go to article Complete a streaming case (Streaming and Restreaming). Then continue to next step.
2. Go to article Approve or override a streaming case (Streaming and Restreaming) to approve or override the streaming case.

7 Record access decision

7.1 Age and Residency Sub Criterion

1. Use article Check eligibility – age and residence requirements to help you decide if the age and residence requirements are met.

7.1.1 Age Criterion 1: (Section 22(1)(a))

1. At **Is the applicant under the age of 65 years old?** select **Yes** or **No**. If
    - **Yes**, go to section **Residency Criterion 1: (Section 23(1)(a))** to consider the next criteria.
    - **No**, continue to next step.
2. Select **Next**.
3. Select **N/A** for all early intervention and disability requirements. You don't need to consider the remaining eligibility requirements.
4. Go to section **Evidence Used for Decisions**.

7.1.2 Residency Criterion 1: (Section 23(1)(a))

1. At **Is the applicant currently living in Australia?** select **Yes** or **No**. If:
    - **Yes**, go to section **Residency Criterion 2: (Section 23(1)(b))** to consider the next criteria.
    - **No**, continue to next step.
2. Select **Next**.
3. Select **N/A** for all early intervention and disability requirements. You don't need to consider the remaining eligibility requirements.
4. Go to section **Evidence Used for Decisions**.

7.1.3 Residency Criterion 2: (Section 23(1)(b))

1. At **Is the applicant an Australian Citizen or a Current Eligible Visa Holder?** select **Yes** or **No**. If:
    - **Yes**, select **Next** and go to section **Early Intervention Sub Criteria** to consider the next criteria.
    - **No**, continue to next step.
2. At **Why does the applicant not meet the sub criteria?**, select the relevant option.
3. Select **Next**.
4. Select **N/A** for all early intervention and disability requirements. You don't need to consider the remaining eligibility requirements.
5. Go to section **Evidence Used for Decisions**.
6. Select **Next**.

7.2 Early Intervention Sub Criteria

1. Use article Understand early intervention requirements to help you decide if the early intervention requirements are met.
2. Consider if the applicant has an impairment on List B or D. This no longer populates in the access decision. You need to select the relevant criteria manually. If:
    - **list D** and the child is younger than 7, select **Yes** to all early intervention requirements and select **Next**.
    - **list B**, select **Yes** to **Early Intervention Criterion 1: (Section 25(1)(a))** and **Early Intervention Criterion 2: (Section 25(1)(b))**. Then consider the remaining early intervention requirements based on the evidence.
3. If none of the above, consider each early intervention requirement based on the evidence. All early intervention requirements must be answered.
4. If you select **No** for any criteria, select the reason the early intervention requirement is not met.

7.2.1 Early Intervention Criterion 1: (Section 25(1)(a))

1. At **Is there one or more identified intellectual, cognitive, neurological, sensory or physical impairments that are, or are likely to be permanent (section 25(1)(a)(i) or is there one or more identified impairments that are attributable to a psychiatric condition that are, or are likely to be, permanent (section 25(1)(a)(ii))?**:
    - Select **Yes** or **No**.
    - If **No** and the applicant is younger than 6, there will be questions to consider if the child has a developmental delay that meets the early intervention requirements.

7.2.2 Early Intervention Criterion 2: (Section 25(1)(b))

1. At **Is the provision of early intervention supports likely to benefit the person by reducing the person's future needs for supports in relation to disability?**

1.
    - Select **Yes** or **No**.

7.2.3 Early Intervention Criterion 3: (Section 25(1)(c))

1. At **Is the provision of early intervention supports likely to improve, or reduce deterioration, of functional capacity or strengthen sustainability of informal supports?**:
    - Select **Yes** or **No**.

7.2.4 Early Intervention Criterion 4: (Section 25 (d))

1. At **Are any early intervention supports that would be likely to benefit the person as mentioned in paragraphs 25(1)(b) and (c) NDIS supports?**:
    - Select **Yes** or **No**.
2. Select **Next**.

7.3 Disability Sub Criterion

1. Use article Understand disability requirements to help you decide if the disability requirements are met.
2. Consider if the applicant has an impairment on List A or B. This no longer populates in the access decision. You need to select the relevant criteria manually. If:
    - **list A**, the disability requirements are met. Select **Yes** to all disability requirements and select **Next.**
    - **list B**, select **Yes** to **Disability Criterion 1: (Section 24 (1)(a))** and **Disability Criterion 2: (Section 24 (1)(b))**. Then consider the remaining disability requirements based on the evidence.
3. If none of the above, consider each disability requirement based on the evidence. All disability requirements must be answered.
4. If you select **No** for any criteria, select the reason the disability requirement is not met.

7.3.1 Disability Criterion 1: (Section 24 (1)(a))

1. At **Are the impairment(s) attributable to one or more intellectual, cognitive, neurological, sensory or physical impairments or to psychiatric condition(s)?**:
    - Select **Yes** or **No**.

7.3.2 Disability Criterion 2: (Section 24 (1)(b))

1. At **Are the impairment(s) permanent, or are they likely to be permanent?**:
    - Select **Yes** or **No**.

7.3.3 Disability Criterion 3: (Section 24 (1)(c))

1. At **Does the impairment(s) result in substantially reduced functional capacity?**:
    - Select **Yes** or **No**.

7.3.4 Disability Criterion 4: (Section 24 (1)(d))

1. At **Does the impairment affect the person's capacity for social and economic participation?**:
    - Select **Yes** or **No**.

7.3.5 Disability Criterion 5: (Section 24 (1)(e))

1. At **Is the person likely to require support under the NDIS for their lifetime**?:
    - Select **Yes** or **No**.
2. Select **Next.**

7.4 Evidence Used for Decisions (access not met only)

1. For any access criteria the person does not meet, record:
    - **Evidence type**
    - **Evidence** (if required) – start to enter the linked evidence name, then select relevant document.

- **Explanation** – record Criteria not met – see linked evidence.

2. Select **Next**.

7.5 Decision Main Criteria

1. These questions will automatically be completed with **Access Met**, **Access Not Met** or **N/A**:
   - **Does the person meet Age Criteria**
   - **Does the person meet Residency Criteria**
   - **Does the person meet Disability Criteria**
   - **Does the person meet Early Intervention Criteria**
   - **Overall decision**.

   Note: An applicant may meet both the disability and early intervention requirements.
2. If **Overall decision** is:
   - **Access Not Met**, go to step 9.
   - **Access Met**, go to next step.
3. Open the [Impairment Categories Guide] to complete the next steps.
4. Search the **ICD 10 Code** or **Condition** name for **all** impairments that meets the requirements for disability, early intervention, or both.
5. Note the **Required impairment category** column.
6. Consider if any of the **Optional impairment categories** in the guide apply based on the evidence provided:
   - **Intellectual** – such as how they speak and listen, read and write, solve problems, and process and remember information.
   - **Cognitive** – such as how they think, learn new things, use judgment to make decisions, and pay attention.
   - **Neurological** – such as how their body functions.
   - **Sensory** – such as how they see or hear.
   - **Physical** – such as the ability to move parts of their body.
   - **Psychosocial** - This means they have reduced capacity to do daily life activities and tasks due to your mental health.
7. If the early intervention requirements are met, at **Which of the following meet the eligibility criteria for access?**, select options that apply for **all eligible** impairments that met the early intervention requirements:
   - **Intellectual**
   - **Cognitive**
   - **Neurological**
   - **Sensory**
   - **Physical**
   - **One or more impairments to which a psychological disability is attributable**
   - **Developmental Delay**.

8. If the disability requirements are met, at **Which of the following meet the eligibility criteria for access?**, select options that apply for **all eligible** impairments that met the disability requirements:
    - **Intellectual**
    - **Cognitive**
    - **Neurological**
    - **Sensory**
    - **Physical**
    - **One or more impairments to which a psychological disability is attributable**.

    Note: This is important as we only fund NDIS supports for eligible impairments that meet the requirements for disability, early intervention or both.
9. If the decision isn't correct: Select **Back**.
    - Re-check and update **previous** criteria as per above steps.
10. If the decision is correct:
    - **Select Save for later**.

7.5.1 If access met for applicant with chronic health condition

You **must** request technical advice from the Technical Advisory and Practice Improvement branch (TAPIB).

1. First send a technical support request to SEB.QUALITY to request Quality Development Officer (QDO) feedback.
2. If the QDO agrees, request technical advice from TAPIB using the following articles:
    - Create a technical advice case
    - Complete the risk matrix for a technical advice case
    - Review and action returned technical advice case.

    Note: You can review relevant article in the TAPIB Digest to help you refine your request.

If access met for applicant younger than 25 with primary psychosocial disability

You **must** receive endorsement from your team leader or assistant director.

- First send a technical support request (Review Request: Under 25 Psychosocial) to SEB.QUALITY to request QDO feedback.
- If the QDO agrees, they will email your team leader or assistant director to request endorsement.

7.5.2 If access met and the applicant resides in hospital

You **must** ask for QDO feedback.

1. Send a technical support request to SEB.QUALITY to request QDO feedback. They will decide if TAPIB advice is required.

8 Submit decision for quality check

8.1 Submit proposed decision for potential quality check

1. Complete the Access Assessor Outcome Form to submit the proposed access decision for a potential quality check. An email will advise you if the proposed decision is sent for quality check. If:
    - **not sent** for quality **check**, go to section **Approve access decision**
    - **sent** for quality check, go to section **Review quality check feedback**.

8.2 Review quality check feedback

1. Review quality check feedback when received by email. If:
    - **no adjustment** required and **you** agree with the feedback, go to section **Approve access decision**
    - **adjustment required** and you **agree** with the feedback, continue to next step.
2. Re-assess and amend access decision in line with the feedback.
3. From the **Decision Main Criteria** screen, select **Save for later**.
4. Go to section above **Submit proposed decision for potential quality check** to re-submit for a potential quality check.

Note: For technical support to understand the legislative criteria, please send a technical support request to SEB.QUALITY.
If you **don't agree** with the feedback, contact your team leader about the reconsideration process.

8.3 Approve access decision

1. Return to **Decision Main Criteria** view.
2. Select **Approve** to submit decision.
3. Go to section **Complete access decision correspondence**.

9 Complete access decision correspondence

9.1 Automated Access Met letter

1. Check the correspondence preferences of the applicant are correct. Select **Next**.
2. At **Do you want to preview the document before sending it?** select **Yes** or **No**.
3. If you select **Yes**, you need to **Select a Recipient for preview?**. Select the applicant you wish to preview the correspondence for and select **Next**.
4. A letter preview will generate.
5. If correct, select **Next**. If incorrect, select **Previous** to update the fields that populate the letter.
6. Select **Submit Correspondence**. An automatic access met decision letter will be sent to the person or authorised representative.
7. At **Correspondence Summary** select **Next**.
8. Select **Done** to close the access decision case.

9.1.1 Check correspondence

1. In the **Access Decision** case, select the **Documents** tab.
2. Check for **Outcome of Application – Eligible letter**. **Category** is **Outbound Correspondence**. If:
   - **Yes**, go to section **Check disabilities tab**
   - **No**, go to next step.
3. Submit a Report a defect with PACE, my NDIS Provider or Participant Portal, or my NDIS App ticket,
4. Share the ticket with your team leader and assistant director.
5. Go to section **Next steps**.

9.2 Manual Access Not Met letter

PACE **won't** generate an automatic **Access Not Met letter**. You need to complete and send a manual letter.

1. Select **Done** to close the access decision case.
2. Complete the manual access not met letter using these articles:
   - Letter –Access not met decision
   - Template – Access not met decision – post legislation changes.

   Note: Only the letter text is required from this resource. **Interactions are not required**.
3. Use article Send a manual letter to complete this process.

10 Notify early childhood partner of access not met decision (developmental delay only)

If the child is younger than 6 with a developmental delay, you need to notify the early childhood partner of the access not met decision.

1. Create an **Enquiry** case and reassign to the **MyNDIS Contact** using article Create an enquiry case.
2. At **Requested By**, select **General Enquiry Only**.
3. At **Case Origin**, select **Internal**.
4. At **Enquiry Type**, select **Partner Supported Access**.
5. At **Category**, select **General Information**.
6. In **Enquiry Notes**, use the following template:
7. Access not met decision for developmental delay made on **<Date>**.

Evidence provided does not support the developmental delay criteria because <provide a summary of the justification for the decision e.g. the applicant does not have a significantly lower ability to do everyday activities, when compared to children of the same age>.

<If the child is turning 6 within 90 days: The child is turning 6 within 90 days. It may be more appropriate to support the applicant with an internal review, rather than a new access request. For an access request, the child must be younger than 6 on the day the access decision is made. For an internal review, the child must have been younger than 6 at the time of the access not met decision. This reduces the risk of the child turning 6 before an access decision is made.**>**
Access request outcome will be communicated to the applicant's authorised representative – refer to case activity for updates.

Please support applicant with next steps such as early connections.

8. At **Enquiry Outcome** select **Re-assign** this enquiry to another user.
9. At **Case Re-assignment Reason** select **Referral to Partner**.
10. At **Select User or Queue** select **User**.
11. At **Case Owner** enter the applicant's **MyNDIS Contact**.

11 Check disabilities tab (access met only)

The **Disabilities** tab **must** include all impairments that meet the requirements for disability, early intervention or both as this affects planning.

There may be impairments that you need to add or remove.

1. From the **Person Account**, select **My Profile**.
2. Select the **Disabilities** tab.
3. Review **Active status** to see what impairments are current.
4. If required, use article Update a person account to:
    - add **impairments** that meet the eligibility requirements
    - **remove** any impairments that don't meet the eligibility requirements by adding an **End Date**.

12 Assign plan approval case (Motor neurone disease only)

If you are in the Priority Health Access Team and have made an access met decision for an applicant with Motor neurone disease (also known as Lou Gehrig's disease or Amyotrophic lateral sclerosis), assign the **Plan Approval** case to the **Aged Care Referral Routing Queue**.

In all other situations, a plan approval case will automatically route to the relevant queue.

1. In the **Plan Approval** case, select the **Change Owner** icon next to the current **Case Owner**.
2. Select the **Users** icon (on the left of the search bar) then select **Queues**.
3. At the **Search Users** free text field, search and select **Aged Care Referral Routing Queue**.
4. Select **Change Owner**.

13 Next steps

1. After you complete the access decision case, an automatic contact applicant task will create. Contact the applicant or their authorised representative. If:
   - **Access met** or **access not met**, go to article Contact to advise outcome of access decision.
   - **Further information requested**, go to article Contact to request further information for access decision.
2. For an access met decision, a plan approval case will automatically route to the relevant queue for a planner to develop their first participant NDIS plan.

Make an access decision - pre-legislation changes

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This article provides guidance for an access delegate (assessor) to:

- check legislative timeframes
- complete disability evidence
- request further information
- approve or override the streaming case
- record access decision
- submit decision for quality check
- complete access decision correspondence
- notify early childhood partner of access not met decision (developmental delay only)
- check disabilities tab (access met only)
- assign plan approval case (Motor neurone disease only).

The legislation you need to use automatically populates in the access decision case based on what is selected in the access request case.

Go to article Complete pre-assessment of access decision to decide which version of the legislation and article you need to use to make an access decision.

Use this article if you need to use the **pre-legislation changes** version of the legislation to make an access decision.

1 Recent updates

3 October 2024

- Updated guidance to reflect legislation changes from 3 October 2024
- Update title from Make access decision to make it clear to use this article when making a decision using the pre-legislation changes version of the legislation
- New step to advise the justice liaison officer (JLO) when requesting more evidence (if relevant)
- New step to notify early childhood partner of access not met decision (developmental delay only)
- New step to assign plan the approval case (Motor neurone disease only).

2 Before you start

You have:

- completed the pre-assessment and checked you need to use the **pre-legislation changes** version of the legislation to make an access decision using article Complete pre-assessment for an access decision
- checked there is evidence of identity or an internal note to explain why it can't be provided
- checked the application is complete with evidence of consent to apply, age, residence and disability
- read article Check eligibility – age and residence requirements
- read article Understand disability requirements
- read article Understand early intervention requirements.

3 Check legislative timeframes

You have **21 days** to make a decision or request further information.

When a request for further information has been made, you have **14 days** from the date that the last information or report was received to make a decision.

1. Use article Check decision – legislative timeframes to check if your decision or request for further information will be outside legislative timeframes. If:
    - inside legislative timeframes, go to section **Complete disability evidence**.
    - outside legislative timeframes, use article Check decision – legislative timeframes to record an internal note. Then go to section **Complete disability evidence**.

4 Complete disability evidence

Links to evidence documents in the access request case will display here.

1. At **Have you verified the Evidence of Disability?**, select **Yes**. This is based on section **Check evidence of disability** in article Complete pre-assessment of access decision.
2. At **Select assessed Impairment**, enter text into the field and a list will display. Select relevant option.
3. At **What evidence was used to confirm the Impairment?**, select the appropriate option.

Note: **Defined Program** no longer populates the access decision.

4. At **Does the applicant's impairment belong to List A, B or D?**, select the appropriate option.

Note: This no longer populates the access decision.

5. For more information about list conditions, go to articles:
   - Check eligibility – List A condition
   - Check eligibility – List B condition
   - Check eligibility – List D condition.
6. Select **Add** next to **Impairment Assessment** to record additional impairments. If an:
   - **access met** decision, add all impairments that meet eligibility requirements
   - **access not met** decision, add all reported impairments.

5 Request further information

1. Decide if you need more information to make an access decision. Only request more information if:
    - the application is complete
    - you need more evidence after receiving the applicant's disability evidence.
2. If the applicant is a child with developmental delay turning 6 within the next 90 days, check with your team leader before requesting more information.

In this situation, it may be more appropriate to make an access not met decision. For an access request, the child must be younger than 6 on the day the access decision is made. For an internal review, the child must have been younger than 6 at the time of the access not met decision. This reduces the risk of the child turning 6 before an access decision is made.

3. At **Do you require further information from the applicant?**, select **Yes** or **No**. If:
    - **No**, select **Next**, then go to section **Approve or override streaming case**.
    - **Yes**, continue to next step.
4. At **Enter the Required Information below**, copy relevant templates from Templates for requesting further information to make a decision – Pre-legislation changes.
5. Select **Next**.
6. Select one or more of the criteria for the requested information from the provided tick boxes.
7. Select **Next**.
8. Select **Done**.
9. Select **Next**.
10. At **Do you want to preview the document before sending it?**, select **Yes**.
11. Complete **Select a Recipient for preview** to preview the letter.
12. If correct, select **Next**. If incorrect, select **Previous** to update the fields that populate the letter.
13. Select **Submit Correspondence**.
14. Select **Next**. A letter will automatically be sent to the applicant or their authorised representative to request further information. The access decision case is automatically closed.

5.1 Check correspondence

1. From the **Person Account** case, select the **Documents** tab.
2. Check for **Further Information Requested** letter. **Category** will be **Outbound Correspondence**. If:
    - **Yes**, if there is a justice liaison officer, go to section **Notify the justice liaison officer (JL) (if relevant)**. If not, go to section **Next steps**.
    - **No**, go to next step.
3. Submit a Report a defect with PACE, my NDIS Provider or Participant Portal, or my NDIS App ticket.
4. Share the ticket with your team leader and assistant director.

5. If there is a justice liaison officer, go to section **Notify the justice liaison officer (JL) (if relevant)**. If not, go to section **Next steps**.

5.2 Notify the justice liaison officer (JLO) (if relevant)

5.2.1 Create the enquiry case

1. Create an **Enquiry** case and reassign to the **MyNDIS Contact** using article Create an Enquiry case.
2. At **Requested By**, select **General Enquiry Only**.
3. At **Case Origin**, select **Internal**.
4. At **Enquiry Type**, select **Access**.
5. At **Category**, select **Access Request**.
6. At **Sub Category**, select **Escalation Enquiry**.
7. In **Enquiry Notes**, use the following template:

Further information requested to support **<Applicant's name>** NDIS application.

More information is needed on **<permanency/functional capacity/lifetime supports/future support needs/whether the NDIS is the most appropriate service>** of **<Impairment/Impairments>**. **<Reason this information is being requested>**.

Refer to Request for More Evidence letter in the person account for more information.

Support the applicant to provide more evidence by **<Date>** (90 days).

8. At **Enquiry Outcome** select **Keep enquiry open - Do not re-assign**. This will allow you to assign the case to the JLO later with an email notification.

5.2.2 Assign the enquiry case

1. From the **Enquiry** case, select the **Change Owner** icon next to the current **Case Owner**.
2. At the **Search Users** free text field, search for the **MyNDIS Contact**.
3. Select the tick box next to **Send notification email**.
4. Select **Change Owner**.
5. Go to section **Next Steps**.

6 Approve or override the streaming case

The streaming case is critical to make sure the Typical Support Package (TSP) is generated for eligible applicants, and they're assigned to the correct team. This is important to make sure they receive the support level they need to engage with the NDIS.

Generally, the streaming case is completed by a local area coordinator, early childhood partner or planner and the case routes to an access delegate for approval.

1. Check for a streaming case. A streaming case **must** be completed and approved **before** completing the access decision case. If:
    - **Yes**, continue to next step.
    - **No**, create a streaming case. Go to article Complete a streaming case (Streaming and Restreaming). Then continue to next step.
2. Go to article Approve or override a streaming case (Streaming and Restreaming) to approve or override the streaming case.

7 Record access decision

7.1 Age and Residency Sub Criterion

1. Use article Check eligibility – age and residence requirements to help you decide if the age and residence requirements are met.

7.1.1 Age Criterion 1: (Section 22(1)(a))

1. At **Is the applicant under the age of 65 years old?** select **Yes** or **No**. If
   - **Yes**, go to section **Residency Criterion 1: (Section 23(1)(a))** to consider the next criteria.
   - **No**, continue to next step.
2. Select **Next**.
3. Select **N/A** for all early intervention and disability requirements. You don't need to consider the remaining eligibility requirements.
4. Go to section **Evidence Used for Decisions**.

7.1.2 Residency Criterion 1: (Section 23(1)(a))

1. At **Is the applicant currently living in Australia?** select **Yes** or **No**. If:
   - **Yes**, go to section **Residency Criterion 2: (Section 23(1)(b))** to consider the next criteria.
   - **No**, continue to next step.
2. Select **Next**.
3. Select **N/A** for all early intervention and disability requirements. You don't need to consider the remaining eligibility requirements.
4. Go to section **Evidence Used for Decisions**.

7.1.3 Residency Criterion 2: (Section 23(1)(b))

1. At **Is the applicant an Australian Citizen or a Current Eligible Visa Holder?** select **Yes** or **No**. If:
   - **Yes**, select **Next** and go to section **Early Intervention Sub Criteria** to consider the next criteria.
   - **No**, continue to next step.
2. At **Why does the applicant not meet the sub criteria?**, select the relevant option.
3. Select **Next**.
4. Select **N/A** for all early intervention and disability requirements. You don't need to consider the remaining eligibility requirements.
5. Go to section **Evidence Used for Decisions**.
6. Select **Next**.

7.2 Early Intervention Sub Criteria

1. Use article Understand early intervention requirements to help you decide if the early intervention requirements are met.
2. Consider if the applicant is from a defined program in WA or has an impairment on List A, B or D. This no longer populates in the access decision. You need to select the relevant criteria manually. If:
    - **defined program in WA**, all the disability requirements are met. Select **N/A** to all early intervention requirements and select **Next**. If the applicant is from a defined program not in WA or was a former participant, this is no longer relevant to the decision. They need to meet all eligibility requirements.
    - **list A**, all the disability requirements are met. Select **N/A** to all early intervention requirements and select **Next**.
    - **list D** and the child is younger than 7, select **Yes** to all early intervention requirements and select **Next**.
    - **list B**, select **Yes** to **Early Intervention Criterion 1: (Section 25(1)(a))** and **Early Intervention Criterion 2: (Section 25(1)(b))**. Then consider the remaining early intervention requirements based on the evidence.
    - applicant is **7 or older**, first consider the disability requirements. If the disability requirements are met, select **N/A** to all early intervention requirements and select **Next**.
3. If none of the above, consider each early intervention requirement based on the evidence. All early intervention requirements must be answered.
4. If you select **No** for any criteria, select the reason the early intervention requirement is not met.

7.2.1 Early Intervention Criterion 1: (Section 25(1)(a))

1. At **Is there one or more identified intellectual, cognitive, neurological, sensory or physical impairments that are, or are likely to be permanent (section 25(1)(a)(i) or is there one or more identified impairments that are attributable to a psychiatric condition that are, or are likely to be, permanent (section 25(1)(a)(ii))?**:
    - Select **Yes** or **No**.

7.2.2 Early Intervention Criterion 2: (Section 25(1)(b))

1. At **Is the provision of early intervention supports likely to benefit the person by reducing the person's future needs for supports in relation to disability?**:
    - Select **Yes** or **No**.

7.2.3 Early Intervention Criterion 3: (Section 25(1)(c))

1. At **Is the provision of early intervention supports likely to improve, or reduce deterioration, of functional capacity or strengthen sustainability of informal supports?**:
    - Select **Yes** or **No**.

7.2.4 Early Intervention Criterion 4: (Section 25(3))

1. At **Are early intervention supports most appropriately funded or provided through the NDIS, and not through another service system?**:
    - Select **Yes** or **No**.

2. Select **Next**.

7.3 Disability Sub Criterion

1. Use article Understand disability requirements to help you decide if the disability requirements are met.
2. Consider if the applicant is from a defined program in WA or has an impairment on List A, B or D. This no longer populates in the access decision. You need to select the relevant criteria manually. If:
    - **defined program in WA**, all the disability requirements are met. Select **Yes** to all disability requirements and select **Next**. If the applicant is from a defined program not in WA or was a former participant, this is no longer relevant to the decision. They need to meet all eligibility requirements.
    - **list A**, the disability requirements are met. Select **Yes** to all disability requirements and select **Next**.
    - **list D** and the child is younger than 7, the early intervention requirements are met. Select **N/A** to all disability requirements and select **Next**.
    - **list B**, select **Yes** to **Disability Criterion 1: (Section 24 (1)(a))** and **Disability Criterion 2: (Section 24 (1)(b))**. Then consider the remaining disability requirements based on the evidence.
    - the applicant is **younger than 7** and meets the early intervention requirements, select **N/A** to disability requirements and select **Next**.
3. If none of the above, consider each disability requirement based on the evidence. All disability requirements must be answered.
4. If you select **No** for any criteria, select the reason the disability requirement is not met.

7.3.1 Disability Criterion 1: (Section 24(1)(a))

1. At **Are the impairment(s) attributable to one or more intellectual, cognitive, neurological, sensory or physical impairments or to psychiatric condition(s)?**:
    - Select **Yes** or **No**.

7.3.2 Disability Criterion 2: (Section 24(1)(b))

1. At **Are the impairment(s) permanent, or are they likely to be permanent?**:
    - Select **Yes** or **No**.

7.3.3 Disability Criterion 3: (Section 24(1)(c))

1. At **Does the impairment(s) result in substantially reduced functional capacity?**:
    - Select **Yes** or **No**.

7.3.4 Disability Criterion 4: (Section 24(1)(d))

1. At **Does the impairment affect the person's capacity for social and economic participation?**:
    - Select **Yes** or **No**.

7.3.5 Disability Criterion 5: (Section 24(1)(e))

1. At **Is the person likely to require support under the NDIS for their lifetime?:**
    - Select **Yes** or **No**.
2. Select **Next**.

7.4 Evidence Used for Decisions (access not met only)

1. For any access criteria the person does not meet, record:
    - **Evidence type**
    - **Evidence** (if required) – start to enter the linked evidence name, then select relevant document.
    - **Explanation** – record Criteria not met – see linked evidence.
2. Select **Next**.

7.5 Decision Main Criteria

These questions will automatically be completed with **Access Met**, **Access Not Met** or **N/A**:

- **Does the person meet Age Criteria**
- **Does the person meet Residency Criteria**
- **Does the person meet Disability Criteria**
- **Does the person meet Early Intervention Criteria**
- **Overall decision.**

1. If the decision isn't correct: Select **Back**.
    - Re-check and update previous criteria as per above steps.
2. If the decision is correct:
    - Select **Save for later**.

7.5.1 If access met for applicant with chronic health condition

You **must** request technical advice from the Technical Advisory and Practice Improvement branch (TAPIB).

1. First send a technical support request to SEB.QUALITY to request Quality Development Officer (QDO) feedback.
2. If the QDO agrees, then request technical advice from TAPIB using the following articles:
    - Create a technical advice case
    - Complete the risk matrix for a technical advice case
    - Review and action returned technical advice case.

   Note: You can review relevant **article** in the TAPIB Digest to help you refine your request.

7.5.2 If access met for applicant younger than 25 with primary psychosocial disability

You **must** receive endorsement from your team leader or assistant director.

1. First send a technical support request (Review Request: Under 25 Psychosocial) to SEB.QUALITY to request QDO feedback.
2. If the QDO agrees, the QDO will email your team leader or assistant director to request endorsement.

7.5.3 If access met and the applicant resides in hospital

You **must** ask for QDO feedback.

1. Send a technical support request to SEB.QUALITY to request QDO feedback. They will decide if TAPIB advice is required.

8 Submit decision for quality check

8.1 Submit proposed decision for potential quality check

1. Complete the Access Assessor Outcome Form to submit the proposed access decision for a potential quality check. An email will advise you if the proposed decision is sent for quality check. If:
   - **not sent** for quality check, go to section **Approve access decision**
   - **sent**
     for quality check, go to section **Review quality check feedback**.

8.2 Review quality check feedback

1. Review quality check feedback when received by email. If:
   - **no adjustment** required and you agree with the feedback, go to section **Approve access decision**
   - **adjustment required** and you **agree** with the feedback, continue to next step.
2. Re-assess and amend access decision in line with the feedback.
3. From the **Decision Main Criteria** screen, select **Save for later**.
4. Go to section above **Submit proposed decision for potential quality check** to re-submit for a potential quality check.

Note: For technical support to understand the legislative criteria, please send a technical support request to SEB.QUALITY.

If you **don't agree** with the feedback, contact your team leader about the reconsideration process.

8.2.1 Approve access decision

1. Return to **Decision Main Criteria** view.
2. Select **Approve** to submit decision.
3. Go to section **Complete access decision correspondence**.

9 Complete access decision correspondence

9.1 Automated Access Met letter

1. Check the correspondence preferences of the applicant are correct. Select **Next**.
2. At **Do you want to preview the document before sending it?** select **Yes** or **No**.
3. If you select **Yes**, you need to **Select a Recipient for preview?**. Select the applicant you wish to preview the correspondence for and select **Next**.
4. A letter preview will generate.
5. If correct, select **Next**. If incorrect, select **Previous** to update the fields that populate the letter.
6. If all is correct, select **Submit Correspondence**. An automatic access met decision letter will be sent to the person or authorised representative.
7. At **Correspondence Summary** select **Next**.
8. Select **Done** to close the access decision case.

9.1.1 Check correspondence

1. In the **Access Decision** case, select the **Documents** tab.
2. Check for **Outcome of Application – Eligible letter**. **Category** is **Outbound Correspondence**. If:
   - **Yes**, go to section **Check disabilities tab**
   - **No**, go to next step.
3. Submit a Report a defect with PACE, my NDIS Provider or Participant Portal, or my NDIS App ticket
4. Share the ticket with your team leader and assistant director.
5. Go to section **Next steps**.

9.2 Manual Access Not Met letter

PACE **won't** generate an automatic **Access Not Met letter**. You need to complete and send a manual letter.

1. Select **Done** to close the access decision case.
2. Complete the manual access not met letter using these **articles**:
   - Letter – Access not met decision
   - Template – Access not met decision - Pre-legislation changes.

   Note: Only the letter text is required from this resource. **Interactions are not required**.
3. Use article Send a manual letter to complete this process.

10 Notify early childhood partner of access not met decision (developmental delay only)

If the child is younger than 6 with a developmental delay, you need to notify the early childhood partner of the access not met decision.

1. Create an **Enquiry** case and reassign to the **MyNDIS Contact** using **article** Create an Enquiry case.
2. At **Requested By**, select **General Enquiry Only**.
3. At **Case Origin**, select **Internal**.
4. At **Enquiry Type**, select **Partner Supported Access**.
5. At **Category**, select **General Information**.
6. In **Enquiry Notes**, use the following template:

Access Not Met decision for developmental delay made on **<Date>**.

Evidence provided does not support the developmental delay criteria because <**provide a summary of the justification for the decision e.g. the applicant does not have a significantly lower ability to do everyday activities, when compared to children of the same age>**.

<If the child is turning 6 within 90 days: The child is turning 6 within 90 days. It may be more appropriate to support the applicant with an internal review, rather than a new access request. For an access request, the child must be younger than 6 on the day the access decision is made. For an internal review, the child must have been younger than 6 at the time of the access not met decision. This reduces the risk of the child turning 6 before an access decision is made.**>**

Access request outcome will be communicated to the applicant's authorised representative – refer to case activity for updates.

Please support applicant with next steps such as early connections.

7. At **Enquiry Outcome**, select **Re-assign** this enquiry to another user.
8. At **Case Re-assignment Reason**, select **Referral to Partner**.
9. At **Select User or Queue**, select **User**.
10. At **Case Owner**, enter the applicant's **MyNDIS Contact**.

11 Check disabilities tab (access met only)

The **Disabilities** tab **must** include all impairments that meet the requirements for disability, early intervention or both as this affects planning.
There may be impairments that you need to add or remove.

1. From the **Person Account**, select **My Profile**.
2. Select the **Disabilities** tab.
3. Review **Active status** to see what impairments are current.
4. If required, use **article** Update a person account to:
    - add impairments that meet the eligibility requirements
    - remove any impairments that don't meet the eligibility requirements by adding an **End Date**.

12 Assign plan approval case (Motor neurone disease only)

If you are in the Priority Health Access Team and have made an access met decision for an applicant with Motor neurone disease (also known as Lou Gehrig's disease or Amyotrophic lateral sclerosis), assign the **Plan Approval** case to the **Aged Care Referral Routing Queue**.

In all other situations, a plan approval case will automatically route to the relevant queue.

1. In the **Plan Approval** case, select the **Change Owner** icon next to the current **Case Owner**.
2. Select the **Users icon** (on the left of the search bar), then select **Queues**.
3. At the **Search Users** free text field, search and select **Aged Care Referral Routing Queue**.
4. Select **Change Owner**.

13 Next steps

1. After you complete the access decision case, an automatic contact applicant task will create. Contact the applicant or their authorised representative. If:
    - **Access met** or **access not met**, go to **article** Contact to advise outcome of access decision.
    - **Further information requested**, go to **article** Contact to request further information for access decision.
2. For an access met decision, a plan approval case will automatically route to the relevant queue for a planner to develop their first participant NDIS plan.