

The contents of this document are **OFFICIAL**.

## Create a technical advice case

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**Guidance in this document is not approved for use unless you view it in PACE.**

This article provides guidance for an access delegate, review officer, planner delegate, or planner (non-partnered area) to:

- understand what to complete before creating a technical advice case
- create a technical advice case.

**Note:** If you're creating a **Technical Advice** case for replacement support, go to article [Create and action requests for replacement supports](#).

**Note:** Technical advice is intended to help delegates make decisions. Local area coordinators (LAC) and early childhood (EC) partners don't request technical advice in PACE. LACs and EC partners can email technical advice queries to [47E\(d\) - Certain operations of agencies](#)

## Recent updates

### 3 October 2024

Guidance updated to:

- include additional guidance for review officers to create technical advice from the Internal Review case
- change the mention of System information heading to Case information heading
- advise users not to select restrictive practice (ECS) when creating a Technical Advice case
- advise users not to select categories marked ECS for participants older than 9
- advise users to use Internal Note to add additional information for technical advice questions (if required)
- advise users to use overdue as priority type for children younger than 9
- advise users to use Prioritisation Reason of Scheme Sensitivities for advice about supports for children younger than 9
- add new section for users to check the Technical Advice case has been routed correctly

- add new information for users to complete all required steps for Technical Advice case to route to its relevant team
- add new note for users to avoid manually changing case chevrons
- add link to new replacement support article.

## Before you start

You have:

- read and understood all available information related to your request
- read and understood article [Understand advice categorisation in a technical advice case](#)
- read and understood Mandatory Advice Requests on the Technical Advice and Practice Improvement Branch (TAPIB) intranet page [Requesting Advice](#).

**Note:** Members of the Dog Guide Advisory Group are trialling a streamlined assessment process for Dog Guides. New assessment templates are being used for this process. If you receive a request for a new or replacement Dog Guide on one of the new assessment templates, this is a mandatory TAPIB referral.

To learn more about technical advice services, visit the [Technical Advice and Practice Improvement Branch](#) intranet page and [National Early Childhood \(NEC\) Branch Planning Supports and Quality Team](#) intranet page and resources.

## Create a technical advice case

To request advice from the Technical Advice and Practice Improvement Branch (TAPIB) or National Early Childhood (NEC) Branch Planning Support and Quality team, you need to create a **Technical Advice** case.

If you're:

- a review officer, you'll need to create the **Technical Advice** case from the **Internal Review** case
- all other staff, you'll need to create the **Technical Advice** case from the **Person Account**.

1. On the right hand side of the screen, on the **Case Action Bar**, select **Technical Advice**.

**Note:** This will open up the **Advice categorisation** screen.

2. At **Type**, select the technical advice you're requesting from the drop-down list.

**Note:** Don't select **Restrictive Practice (ECS)** as it can cause the case to route to an incorrect queue.

3. At **Category**, select the advice from the drop-down list. If applicable, at **Sub Category**, select the advice from the drop-down list.

**Note:** Don't select categories marked as **ECS** for participants older than 9. Categories marked as **ECS** must **only** be used for children younger than 9.

4. At **Does this request include restrictive practices or constraints?**, select **Yes** or **No**.

**Note:** If you're a review officer, go to step 8.

5. At **What specific advice do you require in relation to this request?**, in the free text field provide a detailed explanation of the question you'd like answered.

**Note:** If you require technical advice for more than one support, you'll need to submit a technical advice case for each technical advice support.

6. At **Select if this request relates to an AAT (Administrative Appeal Tribunal) matter**, don't select the checkbox. Requests relating to Administrative Appeals Tribunal matters are submitted outside of PACE.

**Note:** You should not request or record information about AAT advice in PACE. The [Administrative Appeals Branch](#) is responsible for managing applications made to the AAT for external review.

7. At **Priority**, select the relevant level from the drop-down list. To learn more about priority levels, go to section **Select the priority** in article [Understand advice categorisation in a technical advice case](#).

**Note:** You must select **Overdue** as the **Priority** for advice on supports for children under 9.

8. Select **Next**.

**Note:** The **Next** button will take you to an additional information screen if more information is required to determine if the request is mandatory. If the request is non-mandatory, it'll ask you to confirm you have spoken with your Team Leader.

Complete or confirm questions on the relevant additional information screen and then:

1. Select **Next**.
2. At the **Confirmation** screen, confirm the information in the request is correct.
3. Select **Submit** and go to section **Submit a technical advice case** in this article to finalise the case.

## Submit a technical advice case

The **Technical Advice** case will open and needs to be finalised. You **must** complete all the steps below before you submit the request to TAPIB or the NEC Branch Planning Support and Quality team. If the below steps aren't completed the case will stay assigned to you and won't go to TAPIB or the NEC Branch Planning Support and Quality team.

To progress the **Technical Advice** case:

1. From the **Details** tab, under the **Case Information** heading, select **Edit Subject** (pencil).
2. At **Subject** field, add the relevant subject using the table below. You can include more than one.

**Note:** You **must** add a **Subject** to the case for it to be triaged quickly to the relevant team.

Subject	Description
s48	Technical advice linked to a plan reassessment
s47A	Technical advice linked to a plan variation
s100	Technical advice linked to an internal review
Terminal illness	Technical advice linked to an applicant or participant with terminal illness
MND	Technical advice linked to an applicant or participant with Motor Neurone Disease (MND)

Huntington's	Technical advice linked to an applicant or participant with Huntington's disease
Hospital discharge	Technical advice referral from Hospital Interface Branch
NEC referral to TAPIB	Technical advice referral from National Early Childhood Branch
Access	Technical advice referral from Scheme Eligibility Branch

**Note:** If no subject relates to the above table, leave the **Subject** field blank.

- At **Prioritisation Reason**, select the relevant reason from the drop-down list if the advice is being prioritised.

**Note:** Select **Scheme Sensitivities** as the **Proritisation Reason** for advice about supports for children under 9.

- Confirm the remaining information recorded in the **Details** tab are correct and make changes if needed.
- Select **Save**.
- Select the **Request** tab.
- Complete the mandatory fields marked with an asterisk before selecting **Next**.

**Note:** The **Next** button may take you to an additional information screen if more information is required to determine if the request is mandatory.

- Record any information the advisor may need to be aware of to action your request.

**Note:** Not all questions may be relevant. Answer as correctly as possible and create an **Internal Note** in the case to include other relevant information. Go to article [Log an activity or internal note](#).

**Note:** You can only select **Yes** or **No** for question **Does the support represent value for money?**. If unsure, select **No**. Create an **Internal Note** in the case and record if the support represents value for money.

- Check for and record any risks associated with the **Technical Advice** case.

10. Link documents from the **Person Account** or upload any documents to support the request if needed. Go to article [Add documents to a case](#).
11. Make sure the **Summary** details are correct.
12. At **I agree that all the information presented is accurate and up to date**, select **Yes** or **No**.

**Note:** If you select **No**, an error message **Please ensure that all the information presented is accurate** will appear and system will not allow you to submit the case.

13. Select **Submit**.

**Note:** Don't manually move the case chevrons from **New** to **In Progress** as it'll disrupt the workflow and delay triaging of the advice.

## Check case is in the correct queue

You **must** check the **Technical Advice** case is in the correct queue. If the request is assigned to an incorrect queue, you must manually assign it to the correct queue:

1. At the **Case Owner** field, select **Change Owner** (the person icon). The **Change Case Owner** screen will display.
2. At the **Search Users** field, select the down arrow next to the **Users** icon and then select **Queues** from the drop-down options.
3. At **Search Queues**, search:
  - **Technical Advice Case (TAB) Routing Queue**, for mandatory TAPIB request **or**
  - **Technical Advice Case (ECS) Routing Queue**, for non-mandatory request for children younger than 9.
4. Select **Change Owner**.

## Next Steps

The technical advice request will now be routed to the TAPIB or NEC Branch Planning Support and Quality team to action.

## Article labels

### PACE user role names

No change.

## Topics

No change.

## Case names

No change.

## Ownership

No change.

## Version control

Version	Amended by	Brief Description of Change	Status	Date
7.1	SGH107	Guidance updated to include SD, IRT and ECS feedback.	DRAFT	2024-08-29
7.2	UFEX8	Peer review	DRAFT	2024-09-02
7.3	SGH107	Action Peer Review Feedback	DRAFT	2024-09-02
7.4	DD0014	EL1 review	DRAFT	2024-09-03
7.5	SGH107	Action peer review feedback	DRAFT	2024-09-04
7.6	SGH107	Action guidance lead feedback	DRAFT	2024-09-05
7.7	JS0082	EL2 review	DRAFT	2024-09-05
7.8	SGH107	Transfer BIL feedback	DRAFT	2024-09-13
7.9	SGH107	Action BIL feedback	DRAFT	2024-09-13
7.10	SGH107	Action VT Review Number of long sentences:6 Number of Passive Sentences:14 Readability:58 Grade Level:7.2	DRAFT	2024-09-16

7.11	DD0014	EL1 feedback	DRAFT	2024-09-24
7.12	SGH107	Action EL1 feedback	DRAFT	2024-09-25
7.13	AT0022	EL2 review	DRAFT	2024-09-25
8.0	JC0088	Class 2 Approval Guidance updated to include SD, IRT and ECS feedback.	APPROVED	2024-09-26



# Complete the risk matrix for a technical advice case

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This article provides guidance for a **planner delegate, access delegate** to:

- complete the risk matrix for a technical advice case.

# 1 Recent updates

## October 2023

Current guidance.

## 2 Before you start

You have created a new technical advice case. Refer to article [Create a technical advice case](#).

You have determined the priority of the case. Refer to article [Understand advice categorisation in a technical advice case](#).

### 3 Complete the risk matrix

When completing a request for technical advice, PACE requires you to complete a risk matrix. Record the type and level for any risks identified.

These risks associated with the request could impact the participant, their nominee, or the NDIS.

From the **Technical Advice** case:

1. Select the **Request tab** and complete the **Request Information** questions.
2. Select **Next**.
3. From the **Risk Matrix** step, answer the question **Has there been any risks identified that may impact the participant, nominee or NDIS associated with this complaint?**

**If you don't identify any risks:**

1. Select **No**.
2. Select **Next** to progress the case.

**If you do identify risks:**

1. Select **Yes**.
2. A list of risks will appear. Select the risk that most closely matches the risk you have identified.
3. Select **Yes** for each risk you identify, select **No** for the risks that aren't applicable.
4. Select **LOW, MEDIUM, HIGH** or **EXTREME** for each of the risks you select. Select the level that most closely matches the risk you have identified.  
**Note:** PACE uses the following acronyms in the question about the Ministers' confidence in the NDIA. MO means Ministerial Order, AMO means Assistant Minister's Office, MaSCO means Member and Senator Contact Officer, QTB means Question Time Briefs.
5. Select **Next**.
6. From the **Summary** step, check all your responses are correct. Select an answer for the question: **As the requestor, I agree that all the information presented is accurate and up to date.**
7. Select **Submit**.  
**Note:** Depending on the risks you have selected, PACE may prompt you to add further information about the identified risk.  
**Note:** If you identify a high or extreme risk, refer to the [TAB Hub Requesting prioritisation of advice](#) to help you decide if your request needs to be escalated.

## 4 Next steps

1. Continue completing the Technical Advice case, refer to article [Create a technical advice case.](#)

# Review and action returned technical advice case

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This article provides guidance for an access delegate, internal review delegate, planner delegate, or complex support needs (CSN) planner to:

- review and action technical advice in PACE.

# 1 Recent updates

**October 2023**

Current guidance

## 2 Before you start

You have:

- read and understood relevant Agency guidance, including [Our Guidelines](#)
- read and understood all available information related to your request
- read and understood Technical Advisory Branch (TAB) resources, including [TAB Digest - Published Advice](#)
- read and understood [Children's Taskforce Branch](#) resources, including [Advice Requests](#) (ndia.gov.au).

### 3 Review and action returned technical advice case

Once a technical advisor has completed your request for advice, you will need to review their advice and complete the returned advice template.

You will receive a PACE notification once the technical advisor submits their advice.

To review and action technical advice, complete the following steps in PACE:

1. Open the **Technical Advice** case and navigate to the **Advice** tab.
2. Review the advice.
3. Navigate to the **Documents** tab.
4. Review any relevant documents or internal notes uploaded by the technical advisor.
5. Return to the **Advice** tab and select **Next**.
6. Select **Yes** or **No** for **I acknowledge and agree to the information above.** and **Do you agree with the advice provided?**
7. **Note:** If you don't agree with the technical advice, talk to your team leader. If you still don't agree with the technical advice, you need to contact the advisor to discuss.
8. Select **Yes** or **No** for the remaining fields.
9. If you discussed the advice with your team leader, complete the free text field **Provide a description of the discussion with your team leader/manager.**
10. Select **Submit**.

The status of the **Technical Advice** case will now be closed.

## 4 Next steps

1. You can now action and complete the task related to the technical advice.

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## Technical Advice and Practice Improvement Branch

### Who we are and what we do

The Technical Advice and Practice Improvement Branch provides technical and clinical subject matter expertise and advice to enable staff to get it right for participants – each time, every time.

### What we can do for you

We are responsible for:

- Delivering a quality experience and outcomes for participants
- Maintaining a sustainable scheme
- Supporting the Agency deliver the Participant Service Charter and Service Guarantee.

TAPIB advice enables Agency staff to:

- Consistently interpret and apply the National Disability Insurance Scheme Act 2013 (NDIS Act), Rules and Operational Guidelines
- Ensure supports are evidence-based and align with best practice guidelines
- Make transparent decisions and explain their decisions to participants.

TAPIB provides subject matter expertise across Agency projects. TAPIB consults on the development of scheme policy, operational guidance, compliance and scheme design.

### TAPIB Confluence

The [TAPIB Confluence](#) contains information about the teams within our branch and how they can help you. You'll also find information about how to request and implement TAPIB advice.

Visit the [TAPIB Confluence](#) to find out how we can make it easier for you to seek and understand clinical and technical advice.

### Leadership team

Our leadership team includes the following:

- Helen [47F -](#) Branch Manager
  - Amber [47F -](#) Director - National Service Delivery
  - Fiona [47F -](#) Director - National Service Delivery
  - Karyn [47F -](#) Director – Specialised Service Delivery
  - Olivia [47F -](#) Director – Reviews, Resolutions and Recoveries
  - Peter [47F -](#) Director – Operations and Practice Improvement
- [Personal](#)

### Contact the Branch

#### General enquiries

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#### Branch Manager

Email: [Helen 47F -](#)

Mobile: [47F -](#)

#### Executive Assistant

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#### Directors

- Amber [47F -](#)  
National Service Delivery
- Fiona [47F -](#)  
National Service Delivery
- Karyn [47F -](#)  
Specialised Service Delivery
- Sandra [47F -](#)  
Specialised Service Delivery (A/g)
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- Olivia [47F -](#)  
Strategic Projects
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- Peter [47F -](#)  
Operations and Practice Improvement

#### Assistant Directors

#### National Service Delivery

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- Jane 47F -
- Laura 47F -
- Tom 47F -
- Lynette 47F (A/g)

#### Specialised Service Delivery

- Julie 47F -
- Sharon 47F -
- Nalini 47F -
- Keely 47F -

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- Naomi 47F -
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#### Strategic Projects

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- Ian 47F -
- Helen 47F - (A/g)
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#### Operations and Practice Improvement

- Erin 47F -
- Cherie 47F -
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## Assistive Technology

Assistive technology (AT) is any device or system that allows individuals to perform tasks they would otherwise be unable to do or increases the ease and safety with which tasks can be performed (World Health Organization).

Examples include wheelchairs, communication devices and modified cutlery.

This page provides information on how to complete a request for TAPIB advice related to assistive technology.

### What NDIS AT resources are available?

In addition to the NDIS Act, Rules the following resources are available.

- [AT Operational Guideline](#)
- [Assistive Technology Practice Guidance](#)
- [Assistive Technology Standard Operating Procedure](#)
- Resources on the [Assistive Technology page of the NDIS website](#)
- [Assistive Technology \(AT\) and Home Modifications \(HM\) page](#)

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## Core, Capacity Building and Mainstream Interface Supports

### Core Supports

- Core funding can be used flexibly between Consumables, Daily Activities and Social Community and Civic participation categories.
- Funds can only be used to purchase reasonable and necessary supports in line with the participant's goals. This is regardless of whether the funding is Agency, self or plan managed.

### Capacity Building (CB) supports:

Capacity Building supports assist participants to increase their ability to live their life independently and achieve their goals.

### Mainstream Interface Supports:

Mainstream supports are provided by other government services, including those provided as part of a universal service obligation. Mainstream supports are available to everyone regardless of whether or not they have a disability. They include state, territory and Commonwealth Government services across 11 categories.

The [National Disability Insurance Scheme \(Supports for Participants\) Rules 2013](#) outlines considerations relating to whether supports are most appropriately funded through the NDIS. Under the law for the NDIS, we can't fund supports that should be provided by a mainstream service.

### What NDIS Core, Capacity Building and Mainstream Interface resources are available?

Refer to the [Practice Guidance and Operational Guidelines page](#) for Agency guidance.

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## Disability Related Health Supports

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Disability Related Health Supports (DRHS) are health supports a participant may require due to their disability. In accordance with section 34(1)(f) of the NDIS Act, the Agency needs to determine whether a support for a participant is most appropriately funded or provided by the NDIS.

The NDIS is responsible for supports relating to a person's ongoing functional impairment that allows the person to undertake activities of daily living. This includes maintenance supports delivered or supervised by clinically trained or qualified health practitioners, where these are linked to the care and support a person requires to live in the community and participate in education and employment (NDIS (Supports for Participants) Rules).

The disability related health supports arrangements are likely to apply to any participant that requires disability-related health supports as outlined in the [Disability-Related Health Supports Operational Guideline](#).

### What NDIS DRHS resources are available?

In addition to the NDIS Act, Rules, and [Disability-Related Health Supports Operational Guideline](#) there is also:

- [Contenance Supports](#)
- [Diabetes Management Supports](#)
- [Dysphagia Supports](#)
- [Epilepsy Supports](#)
- [Nutrition Supports including meal preparation](#)
- [Podiatry and Foot Care Supports](#)
- [Wound and Pressure Care Supports](#)
- [Standard operating procedure - Include disability-related health supports or meal supports in the participant's plan](#)
- [Respiratory Support Practice Guidance](#)
- [Intranet published advices – TAT Digest](#)

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## Home Modifications

Home modifications (HMODs) are changes to the structure, layout or fittings of the participant's home that are required to enable the participant to safely access and move around their home as a result of their disability. The NDIS will fund standard home modifications that are found to be reasonable and necessary to facilitate achievement of the goals in the participant's current plan.

### What NDIS HMODs resources are available?

In addition to the NDIS Act and Rules, the following resources are available.

- Our Guideline – [Our Guideline - Home Modifications](#)
- Standard Operation Procedure – [Include minor home modification supports in plans](#)
- Standard Operating Procedure - [Include complex home modification supports in plans](#)
- Resources on the [Home modifications page](#) of the NDIS website (external)

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## Requesting Advice

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To request TAPIB advice, please [submit a Technical Advice Case in PACE](#).

### ALERT: Updates to TAPIB Mandatory Referral Criteria

The criteria is now categorised by the requesting Branch or Team to help align requests by the delegate's role. We've also aligned the criteria with the support categories in the Transitional Rules and refined the wording to clarify the scope.

[TAPIB Mandatory Referral Criteria](#) is now located on the [TAPIB Confluence](#), [click here to access it](#).

### Early Childhood requests

All non-mandatory advice requests related to supports for children younger than 9 should be progressed to the [National Early Childhood Branch](#) using the technical advice case in PACE.

For any plans developed in SAP CRM, please contact [47E\(d\) - Certain operations of](#) if you require support.

**Screen reader accessibility tip:** The following level 2 headings are expandable. Please navigate to a heading and select to read contents.

- + 1. Before requesting TAPIB Advice**
- + 2. Requesting TAPIB Advice**
- + 3. Implementing TAPIB advice**
- + 4. Withdrawing an advice request**
- + 5. General advice requests**
- + 6. Criteria and process for requesting prioritisation of advice**

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## TAPIB Confluence page

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## Requesting Replacement Supports

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### Replacement Support

A replacement support is not an extra support, but a replacement for an existing NDIS support(s).

TAPIB are the delegates who decide whether a replacement support can be approved for a participant.

### What NDIS Replacement Support resources are available?

In addition to the NDIS Act, Rules, there is also:

- [What does NDIS fund? \(External\)](#)
- [Supports that are NDIS supports \(DOCX 297KB\)](#)
- [Supports that are not NDIS supports \(DOCX 291KB\)](#)
- [Replacement list \(DOCX 282KB\)](#)
- [Create and action a request for a replacement support \(External\)](#)

### How do I refer a replacement support request to TAPIB?

You need to check the participant's request for a replacement support meets the minimum criteria for TAPIB to make a decision.

These are:

- the support the participant is requesting is on the list of replacement supports
- the participant has an approved plan with supports they want to replace
- the participant has contacted us to ask for a replacement support

If the participant's request meets this criteria you need to create a request for replacement support in PACE; see [Create and action a request for a replacement support \(External\)](#).

If the participant's request does not meet this criteria you can't create a request for a replacement support.

### Replacement Support Items

The following Replacement Support items are the only items that can be considered under a replacement support request:

- Standard commercially available household items
- Smart watches
- Tablets
- Smartphones
- Apps for accessibility or communication purposes.

### Contact

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## TAPIB Advisors

The Technical Advice and Practice Improvement Branch service is available to all staff across the service delivery network, providing reasonable and necessary guidance.

Subject Matter Experts (SME) have a strong clinical or disability background and a good understanding of insurance principles (including the value and purpose of early intervention) and how the NDIS applies these principles within the disability sector.

Advisors are located throughout the network.

The team provides additional Specialist Subject Matter expertise, interpretation and advice in terms of decisions which may include one or more of the following areas:

- Psychosocial disability
- Complex behavioural support/behavioural modification programs
- Chronic health and complex medical conditions
- Complex Speech and Communication impairment/communication technology
- Home modifications
- Assistive technology
- Prosthetics and Orthotics
- Audiology

The team further provide:

- Expertise in consistent decision making using critical analysis and sound clinical reasoning.
- Support for delegates in terms of broader planning considerations and provide guidance to lead complex and sensitive conversations where many factors need to be balanced.
- An understanding of how disability impacts on daily living and their subject matter expertise will enable them to identify appropriate supports using an evidence based approach.
- Advice and assistance in interpreting and applying legislative and Operational Policy which may be ambiguous or complex in nature and not able to be answered by Service Delivery Team.

### Types of Advice

TAPIB provide a range of advice from short to detailed, legislative based responses and may include review of current best practice and research. The level of detail will depend on the type of request, the context and the audience.

### How to Make a Request:

Please go to [Requesting Advice](#) for options.

## Contact the Branch

### General enquiries

Email: [47E\(d\) -](#)

### Branch Manager

Email: [Helen 47F -](#)

Mobile: 0436 646 348

### Executive Assistant

Email: [Emma 47F -](#)

### Directors

- Amber [47F -](#)  
National Service Delivery
- Fiona [47F -](#)  
National Service Delivery
- Karyn [47F -](#)  
Specialised Service Delivery
- Sandra [47F -](#)  
Specialised Service Delivery (A/g)
- Shannon [47F -](#)  
Reviews, Resolutions and Recoveries (A/g)
- Olivia [47F -](#)  
Strategic Projects
- Holly [47F -](#)  
Strategic Projects (A/g)
- Peter [47F -](#)  
Operations and Practice Improvement

### Assistant Directors

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Certain  
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### National Service Delivery

- Melinda 47F - Person
- Jane 47F - P
- Laura 47F -
- Tom 47F -
- Lynette 47F (A/g)

### Specialised Service Delivery

- Julie 47F - P
- Sharon 47F
- Nalini 47F -
- Keely 47F -

### Reviews, Resolutions and Recoveries

- Katrin 47F -
- Naomi 47F -
- Adam 47F (A/g)

### Strategic Projects

- Jean 47F -
- Ian 47F -
- Helen 47F - (A/g)
- Tegan 47F - (A/g)  
P

### Operations and Practice Improvement

- Erin 47F
- Cherie 47F -
- Andrew 47F (A/g)

### Related Links

- [TAPIB Confluence Site](#)

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## TAPIB Digest - Published Advice

The TAPIB Digest is now published via the TAPIB External Confluence, [click here to access it](#).

TAPIB Digest articles are real-life examples of technical advices written in response to requests for advice, and are examples of the diversity of NDIS participants. They are intended to provide guidance in applying the NDIS Act, NDIS Rules, and NDIA Operational Guidelines to ensure consistent decision making and communication.

In the case of non-mandatory advice, TAPIB Digest articles may provide sufficient guidance such that an advice request may not be required. However, TAPIB Digest articles do not constitute advice in themselves; and should not be cited as advice, or used in place of advice in response to a submitted advice request.

Furthermore, TAPIB Digest articles do not replace mandatory TAPIB advice requests – though reviewing relevant TAPIB Digest articles prior to seeking mandatory TAPIB advice may assist in refining your question(s) and which criteria you consider met.

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### Contact

Email: [47E\(d\) -](#)

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## Technical Advice and Practice Improvement Branch Services

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Technical Advisors' work is divided into two key streams:

### 1. Advisory Team

Advice and support for delegates on decisions relating to reasonable and necessary funded supports in participant plans.

The team also advises on complex issues requiring Subject Matter Expertise (SME) in Specialist areas such as:

- Complex assistive technology
- Complex home modifications
- Behavioural modification programs
- Complex health conditions
- Psychosocial disability
- Early childhood interventions
- Physical therapies
- Neurological rehabilitation
- Prosthetics and orthotics
- Transport
- Justice/health and other mainstream interfaces
- Guidance related to Operational Policy.

### Eligibility/Access Team Advice

Advisory services to the Scheme Eligibility Branch pertaining to access decisions with more complex diagnoses and functional presentations.

Advisors will provide information to assist Scheme Eligibility staff with matters pertaining to

- Clinical diagnoses
- Likelihood of permanence of diagnoses
- Functional impact of disability
- Complex or chronic health issues and the interface between NDIS and mainstream health services.

### 2. Administrative Reviews Tribunal Team

Provide instruction and Advice to the NDIA Legal team to manage Administrative Reviews Tribunal (ART) matters.

### Contact

Email: 47E(d) -

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The TAPIB ART team have responsibility for:

- Analysing the participant plan under review and any plan reviews
- Identification need for specialist advice or further information
- Consultation with the Service Delivery region and Legal team on issues related to the case
- Provision of advice and instruction to the Legal team and specialist advisors
- In consultation with the Legal team, preparation of an Agency position
- Providing advice to the Legal representative and involvement as a representative of the Agency in case conciliations, case conference and hearings
- Assisting with implementation and monitoring of the outcome of the ARB matter.

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## Vehicle modifications

Vehicle modifications include changes to a vehicle, or the installation of equipment in a vehicle, which enables a person with a disability to gain access to the vehicle and in some cases operate the vehicle. This can include enabling the person to:

- Get in and out of the vehicle with or without a wheelchair.
- Carry their wheelchair in or on the vehicle without lifting.
- Be transported safely whilst seated in their wheelchair.
- Drive the vehicle with specialised controls or other adaptations.

### What NDIS vehicle modification resources are available?

In addition to the NDIS Act and Rules, the following resources are available.

- [Vehicle Modification Operational Guidelines](#)
- [Assistive Technology Practice Guidance](#) (includes Vehicle Modifications)
- [Assistive Technology Standard Operating Procedure](#)
- Resources on the [Assistive Technology page of the NDIS website \(external\)](#).

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#### Enquiries:

Email: 47E(d) -

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## Site Contents

### Lists, Libraries, and other Apps

 SITE WORKFLOWS  SETTINGS  RECYCLE BIN (0)

Documents

39 items  
Modified 5 months ago

Images

30 items  
Modified 2 years ago

Pages

11 items  
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Site Assets

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## s34 Technical Advice Template

---

### Advice Overview

Keywords:

[Keywords]

### Participant Details

Participant Name: [Participant Full Name]

Participant NDIS Number: [Participant NDIS Number]

### Request Details

Requestor ID and Branch: [Requestor User ID and Branch]

Case Number(s) and Advice Request(s):

- [Case Number]
  - [Advice Request]

### Advisor Details

Advisor ID: [Key Advisor User ID]

Advice Cleared by: [Clearing Advisor User ID]

Additional Technical Advice Input provided by: [ALL Peer Reviewer User IDs]

Advice Completion Date: [Advice Completion Date DD/MM/YYYY]

## Technical Advice Case Details

### Documents Referenced:

- [List any documents or phone calls used as evidence to inform your decision]

### Are any other legislative references required?:

- [List references other than NDIA Act 2013, and NDIA (Supports for Participants) Rules 2013]
- **NOTE:** For new Legislation advice, do the following:
  - Include the advisor opinion related to s34(1)(aa) to the s34(1)(a) PACE comment box.
  - Include the following at the start of s34(1)(a) and s34(1)(f) comment boxes in PACE:
    - Opinion against amended legislation 2024.

Delete this guidance before finalising your advice.

### Advisors' Additional Comments:

#### Participant's Situation

- [List Participant Situation Details]

#### Summary of Function

- [List Summary of Function Details]

#### Relevant Existing Supports

- [List Relevant Existing Supports Details]

### Advisor Opinion:

For a support to be considered reasonable and necessary, all criteria in Section 34 of the [NDIS Act 2013](#) must be met and consideration of the [NDIS Supports Transitional Rules 2024](#) and the [NDIS \(Support for Participants\) Rules 2013](#) must be completed.

- [Request 1]  
[Request Item 1 Write Up]
- [Request 2]  
[Request Item 2 Write Up]

- Etc.

#### **Advisor Recommendations / Next Steps for Requestor:**

- [\[List Recommendations / Next Steps Details\]](#)

## **Advice Consideration**

This is for Technical Advice and Practice Improvement Branch (TAPIB) advice only, the decision to approve or decline is the plan delegates decision. TAPIB advice is informed by clinical application and understanding of the impact of providing the support. This includes compulsory protocols agreed with the NDIS Quality and Safeguards Commission. If you disagree with advice from TAPIB or receive more information for the case, discuss this with your team leader or manager. If your team leader or manager agrees, contact TAPIB Advisor or Assistant Director for discussion and resolution.

You should not distribute TAPIB advice as this is internal specialist advice. This aligns with the CEO Direction dated 1 February 2021.

If you provide the participant with written reasons for the decision, this correspondence should be self-contained with your decisions set out. Advice provided by the TAPIB may be paraphrased in written correspondence about the decision.

The contents of this document are **OFFICIAL: SENSITIVE**

## s34 Technical Advice Template (with s34 Detail)

---

### Advice Overview

Keywords:

[Keywords]

### Participant Details

Participant Name: [Participant Full Name]

Participant NDIS Number: [Participant NDIS Number]

### Request Details

Requestor ID and Branch: [Requestor User ID and Branch]

Case Number(s) and Advice Request(s):

- [Case Number]
  - [Advice Request]

### Advisor Details

Advisor ID: [Key Advisor User ID]

Advice Cleared by: [Clearing Advisor User ID]

Additional Technical Advice Input provided by: [ALL Peer Reviewer User IDs]

Advice Completion Date: [Advice Completion Date DD/MM/YYYY]

## Technical Advice Case Details

### Documents Referenced:

- [List any documents or phone calls used as evidence to inform your decision]

### Are any other legislative references required?:

- [List references other than NDIA Act 2013, and NDIA (Supports for Participants) Rules 2013]
- **NOTE:** For new Legislation advice, do the following:
  - Include the advisor opinion related to s34(1)(aa) to the s34(1)(a) PACE comment box.
  - Include the following at the start of s34(1)(a) and s34(1)(f) comment boxes in PACE:
    - Opinion against amended legislation 2024.

Delete this guidance before finalising your advice.

### Advisors' Additional Comments:

#### Participant's Situation

- [List Participant Situation Details]

#### Summary of Function

- [List Summary of Function Details]

#### Relevant Existing Supports

- [List Relevant Existing Supports Details]

### Advisor Opinion:

For a support to be considered reasonable and necessary, all criteria in Section 34 of the [NDIS Act 2013](#) must be met and consideration of the [NDIS Supports Transitional Rules 2024](#) and the [NDIS \(Support for Participants\) Rules 2013](#) must be completed.

- [Request 1]  
[Request Item 1 Write Up]
- [Request 2]  
[Request Item 2 Write Up]

- Etc.

#### **Advisor Recommendations / Next Steps for Requestor:**

- [\[List Recommendations / Next Steps Details\]](#)

## **Advice Consideration**

This is for Technical Advice and Practice Improvement Branch (TAPIB) advice only, the decision to approve or decline is the plan delegates decision. TAPIB advice is informed by clinical application and understanding of the impact of providing the support. This includes compulsory protocols agreed with the NDIS Quality and Safeguards Commission. If you disagree with advice from TAPIB or receive more information for the case, discuss this with your team leader or manager. If your team leader or manager agrees, contact TAPIB Advisor or Assistant Director for discussion and resolution.

You should not distribute TAPIB advice as this is internal specialist advice. This aligns with the CEO Direction dated 1 February 2021.

If you provide the participant with written reasons for the decision, this correspondence should be self-contained with your decisions set out. Advice provided by the TAPIB may be paraphrased in written correspondence about the decision.

## s34 Detail

**Section 34(1)(aa) The support is necessary to address the needs of the participant arising from an impairment in relation to which the participant meets the disability requirements (see section 24) or the early intervention requirements (see section 25).**

**MET / NOT MET**

[Enter information confirming Advisor has considered S34(1)(aa) and indicated the impairment type (intellectual, cognitive, neurological, sensory or physical, and/or developmental delay for EI participants only) that disability is attributable to and determined that the requested support is necessary due to this impairment that was assessed as meeting S24 or S25 (or both)]

**Section 34(1)(a) The support will assist the participant to pursue the goals, objectives and aspirations included in the participant's statement of goals and aspirations.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Section 34(1)(b) The support will assist the participant to undertake activities to facilitate their social and/or economic participation.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Section 34(1)(c) Represents value for money in that the costs of the support are reasonable, relative to both the benefits achieved and the cost of alternative support.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Section 34(1)(d) The support will be, or is likely to be, effective and beneficial for the participant, having regard to current good practice.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]



**Section 34(1)(e) The funding or provision of the support takes account of what it is reasonable to expect families, carers, informal networks, and the community to provide.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Section 34(1)(f) The support is an NDIS Support.**

**MET / NOT MET**

[Enter information; the support is an NDIS Support / not an NDIS Support and reference the NDIS Support List(s) to identify and describe the support as it is categorised in the list (or not)]

## **Reasonable and Necessary Supports Rules**

**Rule 5.1(a): The support(s) is not likely to cause harm to participant or pose risk to others.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Rule 5.1(b): The support(s) is related to the participant's disability.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Rule 5.1(c): The support(s) does not duplicate support already delivered through alternative funding through the NDIS.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Rules 5.1(d) and 5.2(a): The support(s) does not relate to day-to-day living costs such as rent, groceries, utility fees – unless the additional costs are for day-to-day costs directly attributable to the participant's disability.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Rule 5.2(b): If the support(s) is considered a day-to-day living cost, it is ancillary to another support funded or provided under the participant's plan and which otherwise would not be incurred.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Rule 5.3(a): The support(s) is not contrary to a law of the Commonwealth, State or Territory.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

**Rule 5.3(b): The support(s) does not consist of income replacement.**

**MET / NOT MET**

[Enter information; mandatory if any supports do not meet criteria / more information required]

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## s24 & s25 Technical Advice (Access Requirements)

---

### Advice Overview

Keywords:

[Keywords]

### Prospective Participant Details

Prospective Participant Name: [Prospective Participant's full name]

Prospective Participant's NDIS Number: [Prospective Participant's NDIS number]

Primary Disability / Disabilities: [Prospective Participant's listed primary disabilities]

Secondary Disability / Disabilities: [Prospective Participant's listed secondary disabilities]

### Requestor Details

Requestor ID: [Requestor's User ID]

Advice Request: [Advice request submitted by requestor in PACE]

### Advisor Details

Advisor: [Advisor's User ID]

Advice Date: [Advice completion date]

Advice Reviewed by: [Reviewer's User ID]

Advice Cleared by: [Clearer's User ID]

## Technical Advice Case Details

### Evidence Considered

[List evidence considered]

### Advisors' Additional Comments

[List additional comments]

### Advisor's Recommendations / Next Steps

[List recommendations / next steps]

### Are any other legislative references required?

[List other legislative references]

## s24 (Disability Requirements) Legislative Criteria

**Section 24(1)(a): The person has a disability that is attributable to one or more intellectual, cognitive, neurological, sensory, or physical impairments or the person has one or more impairments to which a psychosocial disability is attributable.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

**Section 24(1)(b): The impairment or impairments are, or are likely to be, permanent.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

**Section 24(1)(c): The impairment or impairments result in substantially reduced functional capacity to undertake one or more of the following activities: Communication, social interaction, learning, mobility, self-care, self-management.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

**Section 24(1)(d) The impairment or impairments affect the person's capacity for social or economic participation.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

**Section 24(1)(e) The person is likely to require support under the National Disability Insurance Scheme for the person's lifetime.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

## **s25 (Early Intervention Requirements) Legislative Criteria**

**Section 25(1)(a): A person meets the early intervention requirements if the person:**

- (i) has one or more identified intellectual, cognitive, neurological, sensory, or physical impairments that are, or are likely to be, permanent; or**
- (ii) has one or more identified impairments that are attributable to a psychiatric condition and are, or are likely to be, permanent; or**
- (iii) is a child who has developmental delay.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

**Section 25(1)(b) The CEO is satisfied that provision of early intervention supports for the person is likely to benefit the person by reducing the person's future needs for supports in relation to disability.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

**Section 25(1)(c) The CEO is satisfied that provision of early intervention supports for the person is likely to benefit the person by:**

- (i) mitigating or alleviating the impact of the person's impairment upon the functional capacity of the person to undertake communication, social interaction, learning, mobility, self-care, or self-management; or**
- (ii) preventing the deterioration of such functional capacity; or**
- (iii) improving such functional capacity; or**
- (iv) strengthening the sustainability of informal supports available to the person, including through building the capacity of the person's carer.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

**Section 25(2): The CEO is taken to be satisfied as mentioned in paragraphs (1)(b) and (c) if one or more of the person's impairments are prescribed by the National Disability Insurance Scheme rules for the purposes of this subsection.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

**Section 25(3): Despite subsections (1) and (2), the person does not meet the early intervention requirements if the CEO is satisfied that early intervention support for the person is not most appropriately funded or provided through the National Disability Insurance Scheme, and is more appropriately funded or provided through other general systems of service delivery or support services offered by a person, agency, or body, or through systems of service delivery or support services offered:**

- (a) as part of a universal service obligation; or**
- (b) in Accordance with reasonable adjustments required under a law dealing with discrimination on the basis of the disability.**

**MET / NOT MET**

[Enter information; mandatory if criteria not met / more information required]

## Advisor Opinion

**Does the prospective participant meet access criteria?**

**MET / NOT MET**

[Enter information here; if the participant meets access, specify which set of criteria (s24 OR s25) the participant met access with]

## Advice Consideration

When using this advice to assist with decision making it should be dealt with carefully. The Technical Advice and Practice Improvement Branch (TAPIB) is not the decision maker. Decision makers should base their decisions on the relevant law, and take into account the TAPIB advice and other relevant factors.

Where written reasons are provided for the decision, this correspondence should be self-contained with the decision maker's reasons set out. Reasons contained in the TAPIB advice may be paraphrased in any written correspondence about the decision as the decision maker's reasons, however the TAPIB advice should not be distributed as the decision.































