MUST –DO Steps for determining access CHECKLIST

Once Access Request Form is received:

Client - Search for existing record. If not found, create new client record

- ☐ 1. Record all the client information, including full address and State. Note: we do not require Marital status, Gross family weekly income, Living arrangements (this is collected in participant statement/context), Residential setting (collected in participant statement/context) or Frequency of help/supervision (captured in MAC)
- ☐ 2. Record at least one disability and flag the primary disability in disability tab
- ☐ 3. Complete the Identity Verification tab in Siebel to record documents sighted to verify identity (Do not attach copies of POI documents other than authorised referee statement). If you have completed the Once complete, the Identity Verified checkbox in the header will be checked automatically

Eligibility Case - Create Eligibility Case Header record

- ☐ 4. Send Access Request Receipt Letter (adult or child version)
- ☐ 5. Select Program Name – National Disability Insurance Scheme (TAS, NSW, VIC or SA)
- ☐ 6. Record access request date (date completed form was received)
- ☐ 7. Record information from Access Request Form
- ☐ 8. Use the 'special considerations' template in 'eligibility case' to record useful information about the participant and/or their carers regarding requirements, preferences etc (check this anytime you are contacting or meeting with a participant and keep it up to date)
- ☐ 9. Add contacts and assign all relevant roles
- ☐ 10. Complete POI for parent, guardian or nominee
- ☐ 11. Attach Access Request Form, MAC and any other relevant documents to Siebel record

Assess access requirements (Eligibility Information)

Complete:

- ☐ 12. Access Consent template - (input consent information from the consent form/ARF)
- ☐ 13. Age and Residence (Adult or Child) template

If Age and Residence requirements met, then complete:

- ☐ 14. Decision Tree for Disability and Early intervention requirements (consult Disability/Early intervention checklist if need more information about the access requirements) and attach to record. Decision tree must fully document the evidence that has been taken into account and considerations taken in making the decision against the access requirements (see the SOP for more information). Note if you need to request further information to assess the access request you must extend the access request due date in Siebel manually.
- ☐ 15. Disability/EI Criteria template (based on Decision tree)
- ☐ 16. Record Access Decision, complete the outcome, reason and considerations and approve access decision (by delegate)
- ☐ 17. Set the Current Eligibility Status and Access Type
- ☐ 18. Send the relevant Access letter and Planning Kit (if eligible)