PART 3 PARTICIPANT PROCESSES
Gaining access to DisabilityCare Australia

disabilitycare
Australia

Process overview

Regional Support/Administration Officer

Potential participant enquiry	Prospective participants will contact DisabilityCare Australia to ask whether they can access the scheme, they are directed to the My Access Checker on the website (disabilitycareaustralia.gov.au) or sent hardcopy form.	SRMS
My Access Checker (MAC)	My Access Checker indicates whether a person might meet Access Requirements. New clients are advised to contact DisabilityCare Australia on 1800 800 110 and current clients of disability programs are advised to contact their provider.	MAC tool
Making a Request for access	The prospective participant contacts DisabilityCare Australia to request access to the scheme, they will be provided with an Access Request Kit (which includes the Access Request Form).	MAC tool SRMS
Review the Access Request Form	The site receives the Access Request Form and ensures it is complete, ie all questions are answered and the form is signed. If not complete, contact participant for further information.	SRMS
Receipt Request	Access Request Form is complete, client record is created in Siebel. A letter is sent to the person acknowledging receipt of the Access Request Form. An RSO and a planner are assigned to complete an Access Assessment.	Siebel

21 day timer starts to make an Access decision

Planner/ Regional Support Officer

Access Requirement Assessment	Assessment of the request is made against the Access Requirements. This may include requesting further information or the need for an appointment.	Siebel Word
Access Decision	Planner makes a Decision for Access. Planner sends participants letter advising of outcome and explains next steps. Where person meets the access requirements (becomes a participant) send planning kit.	Siebel Word

Regional Support Officer or Planner to call and make first planning appointment

This provides the step-by-step processes to follow for a prospective participant gaining access to DisabilityCare Australia.

Contents of gaining access process

These parts of the process may occur at any time

Prospective participant enquiry

A prospective participant will contact DisabilityCare Australia to ask for further information about the launch in their location and ask how they can participate in the scheme.

All prospective participants will be given basic information or directed to the website. All prospective participants are strongly encouraged to complete the My Access Checker (either on-line or in paper version), with help if requested.

This tells them if they are likely to meet the access requirements, and the information collected provides a basis for the first conversation with the person if they become a participant, particularly their self-assessment of their support needs.

Enquiries by phone
All external phone enquires will go via the 1800 800 110 number to the call centre. (operated by Data Response)

Call centre operators are provided with standard scripts to provide basic information about the scheme, gaining access to the scheme, and directions to encourage prospective participants to complete the My Access Checker (can post a paper version) on the website.

Calls will only be transferred to a site if site specific information is required. If a call is not answered in the site, it will return to the call centre who will convert the enquiries to an email and sent to that site SRMS.

Calls will be transferred to the site if the caller:

- Has received a letter from DisabilityCare Australia advising them of their participation in the scheme. (See phasing in arrangements)

- Has completed the My Access Checker, and has been directed to call as the next step.

- Requires any assistance or an interpreter to complete the My Access Checker.

- Refuses to use the My Access Checker and would like to arrange an appointment.

Always answer the phone within three rings.

All calls are to be answered with:

> "Good morning/afternoon. Welcome to DisabilityCare Australia, My name is { } how may I help you?"

Be patient and calm on the phone and speak clearly.

Enquiries by email

All email enquires about access or requests for general information that go via the online contact form on disabiltycareaustralia.gov.au or the general enquiries email (enquiries@disabilitycareaustralia.gov.au), are received at National Office enquires SRMS.

- National office will provide standard responses will provide basic information about the scheme, gaining access to the scheme, and providing links to the My Access Checker on the website. Standard Responses, for information only, are available in the Standard Word document located on DisabilityCareNet under *Becoming a Participant*.

- Site specific requests will be redirected to the site SRMS.

Enquires in person

The Regional Administration Officer will, generally, be the first point of contact at the office. Regional Support Officers and Regional Financial Officers may also be expected to undertake this process as required.

Regional Administration Officer to:

1. Welcome the prospective participant to DisabilityCare Australia.

2. Ask if they have received a letter and a consent form, from DisabilityCare Australia advising them of their participation in the scheme

    - Yes: Advise of when they are due to be phased, and explain the process and when they will be contacted (*See Phased in participants 93*)
      No: Step 3

3. Ask if they have completed My Access Checker

    - Yes: Request for Access process *(page 31)*

    - No: Explain the My Access checker process

4. Ask if they would like to complete the My Access Checker at home or they can do in the office (on-line or paper version).

5. If they would like to complete at home:

    a. Give them a copy of the general information booklet A big difference to a lot of lives

    b. Direct the prospective participant to the Can I access support? link on the website disabilitycareaustralia.gov.au/my-access-checker

6. If they would like to complete in office:

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  a. Ask if they require any assistance or an interpreter *(see Interpreter Services page 60)*

  b. Set up the My Access Checker on the in-house computer (kiosk) or provide paper version. Provide assistance to complete if required/requested.

7. If they refuse to do the My Access Checker. Explain why it is important for them to complete the access checker, offer assistance and paper version. The information provided in My Access Checker will help DisabilityCare Australia to understand the impact of their disability and form the basis of the initial discussions with them if they become a participant.

8. If they still refuse to do the My Access Checker, provide them a copy of Access Request Kit (which includes the Access Request Form).

9. Details of this visit should be recorded in the site SRMS.

This process supports the *Operating Guidelines for giving information about becoming a participant.*

My Access Checker (MAC)

My Access Checker will check whether the person completing:

- is within a launch area for year 1

- meets the age requirements for that launch area at the time they are using the MAC

- is a current client of disability programs

- is a permanent Australian resident

- has a permanent and significant disability or a disability that can be helped with early intervention

- has significant support needs OR assistive technology, support equipment, home modifications.

All of the above are checked before the person is given an outcome message that indicates what they do next. The criteria of the MAC are based on the access requirements for year one only. (disabilitycareaustralia.gov.au/my-access-checker-access-requirements)

Positive outcome - "may be able to receive assistance"
- When a new client receives the above message they are asked to contact DisabilityCare Australia with their MAC reference number.

- When a current client of disability programs receives the above message they are asked to talk to their provider.

Making a Request for Access

After a prospective participant receives a MAC outcome message they may contact DisabilityCare Australia to discuss their MAC outcome. These calls will be to the 1800 number and transferred to the relevant site.

Regional Administration Officer to:

1. 📖 Ask the prospective participant for the MAC reference number. A MAC reference

   number is only generated where the person gets a 'positive' MAC outcome message.
   (QRG: MAC - How to view a Potential Participant's MAC Record)

3. Check if prospective participant is an existing client of a disability program and when they are scheduled to be phased into DisabilityCare Australia. If they are requesting access now:

   - Explain they can submit a Access Request Form now and an Access Decision will still be made (within 21 days), however they will not be able to meet with a planner or complete a plan or receive funding until the time they are due to be phased in.

4. If MAC outcome message is **Appear to meet,** check these details:

   - Check the prospective participant will still be the right age by the time they make their access request.

     ○ Hunter and Barwon areas: must be under 65 years of age when the Request for Access is made.

     ○ Tasmania: must be at least 15 but under 25 years of age when the Request for Access is made.

     ○ South Australia: age requirements are based on the age on 1 July 2013 (not the date of the Request for Access).

   - Advise an Access Request Kit can be provided, via post or the prospective participant can pick it up.

- Inform the prospective participant the Access Request Kit is for their use only and should not be distributed to others

- Explain the assessment can take up to 21 days or longer if further information is required

- Ask for/confirm address details

5. The Access Request Kit includes the:

- Access Request Form (General) or Access Request Form (Barwon)

- Factsheet How to become a participant of DisabilityCare Australia

- Factsheet Participating in DisabilityCare Australia (site specific)

  - Barwon

  - Hunter

  - South Australia

  - Tasmania

- Factsheet on Review Rights

- A reply paid envelope

6. If MAC outcome message is **Doesn't appear to meet**

- Confirm the prospective participant's information

- Explain the access criteria of the site and explain why they got the 'does not appear to meet access requirements' message

7. Refer them to website for information about other assistance that may be available and/or refer them to relevant mainstream/community supports or offer them the services of a LAC. In NSW ensure this is a formal referral to AbilityLinks.

8. If person wishes to seek access to DisabilityCare Australia regardless of their MAC outcome message provide them a copy of the Access Request Kit.

9. Site to create a log of all participants packs sent for statistical collection purposes

This process supports the *Operating Guidelines for Making an Access Request*

Negative outcome – "do not appear to meet access requirements"
- When a new client receives the above message they are encouraged to check the access requirements, find out what services may be available to them outside DisabilityCare Australia or to contact us.

- When a current client of disability programs receives the above message they're encouraged to contact their service provider, find out what other services may be available to them outside DisabilityCare Australia, review the access requirements or to contact us if they have further questions.

> **!** *MAC currently gives responses based on Year 1 launch areas and age requirements, so that someone in ACT or Barkly area in NT or a child aged 6-13 will get the outcome message that they do not meet launch site requirements, even though they could meet launch area/age requirements for Year 2 launch. MAC will be updated to include Year 2 requirements in the coming months.*

Review the Access Request Form

A Request for Access is made using the Access Request Form, provided in the Access Request Kit.

Access Request Forms will be posted to the National GPO Box and received by the site in SRMS as an email attachment. Forms may also be hand delivered.

> **!** *The Access Request form is an 'Approved Form'. DisabilityCare Australia can refuse to accept an Access Request form that was not provided to the potential participant directly by DisabilityCare Australia*

Regional Administration Officer to:

1. For forms mailed or emailed: open SRMS page, open email and Access Request Form will be attached.

2. For forms delivered by hand:

   - Stamp with site received stamp *(See hand delivered material **Error! Bookmark not defined.**)*

   - Scan and save to SRMS, until client record is created

3. An Access Request Form can only be accepted when the form is complete.

4. Check the Access Request Form is complete:

   - Part A

     Confirm all details in Part A have been completed.

     How would they like to be contacted? ie; If email make sure email address was provided.

Do they require an interpreter? If "yes" have the specified in which language?

Have they used the My Access Checker? If "yes" have they provided their reference number and/or a copy of their responses to the form?

Have they provided information on their disability? Have they indicated a primary disability?

- Part B

  Does Part B need to be completed by a Parent, Legal Guardian or Representative?

  If "yes" have all details been completed

- Part C, D

  Information for the prospective participant to read regarding Privacy and how DisabilityCare Australia will use and store their information

- Part E

  E1 exchange of Information with DHS

  Has the prospective participant given consent for DisabilityCare Australia to contact DHS regarding information about them? If "yes" Check the CRN is provided.

  If Part B has been completed by a Representative, have they consented to DisabilityCare Australia contacting DHS for information regarding the prospective participant? If "yes" check they have provided the CRN.

  Check Part E 1 has been signed and dated by either the participant or the carer.

- E2 exchange of information with other sources-(E2 and E3 in Victoria)

  If 'Yes' check the prospective participant has specified which organisations DisabilityCare Australia can contact to obtain information.

  Check if the prospective participant has agreed to participate in research conducted by or on behalf of DisabilityCare Australia?

  Check if the prospective participant has agreed to participate in research about NDIS by other organisations other than DisabilityCare Australia?

- Signature and Confirmation

Check all the boxes been ticked to indicate the prospective participant has read and is aware of all the information provided in this form?

Does it need to be signed by the Parent, Legal Guardian or Representative.

Note that as long as the person appears to speak for the prospective participant, and we have no knowledge that this is not the case, then we can assume legally that they act as an agent for the prospective participant.

- Check the form is signed and dated.

5. If the form is not complete, contact the prospective participant to explain:

- That the form cannot be accepted as not all required information is complete

- What information is missing

- Make arrangements to get the form completed.

- If the form is missing information (other than signature) it is acceptable to get the responses from the person over the phone or by email.

   i. Over the phone, print the Access Request Form, annotate form to identify what has been provided by phone and sign form, scan and load to SRMS, then attach to the **Eligibility Case** tab when client record is created, and note in the comments field of the attachment that it is the annotated version.

   ii. If by email, load email to SRMS, then attach to the **Eligibility Case** tab when client record is created, and note in the comments field of the attachment this is annotation to the Access Request Form.
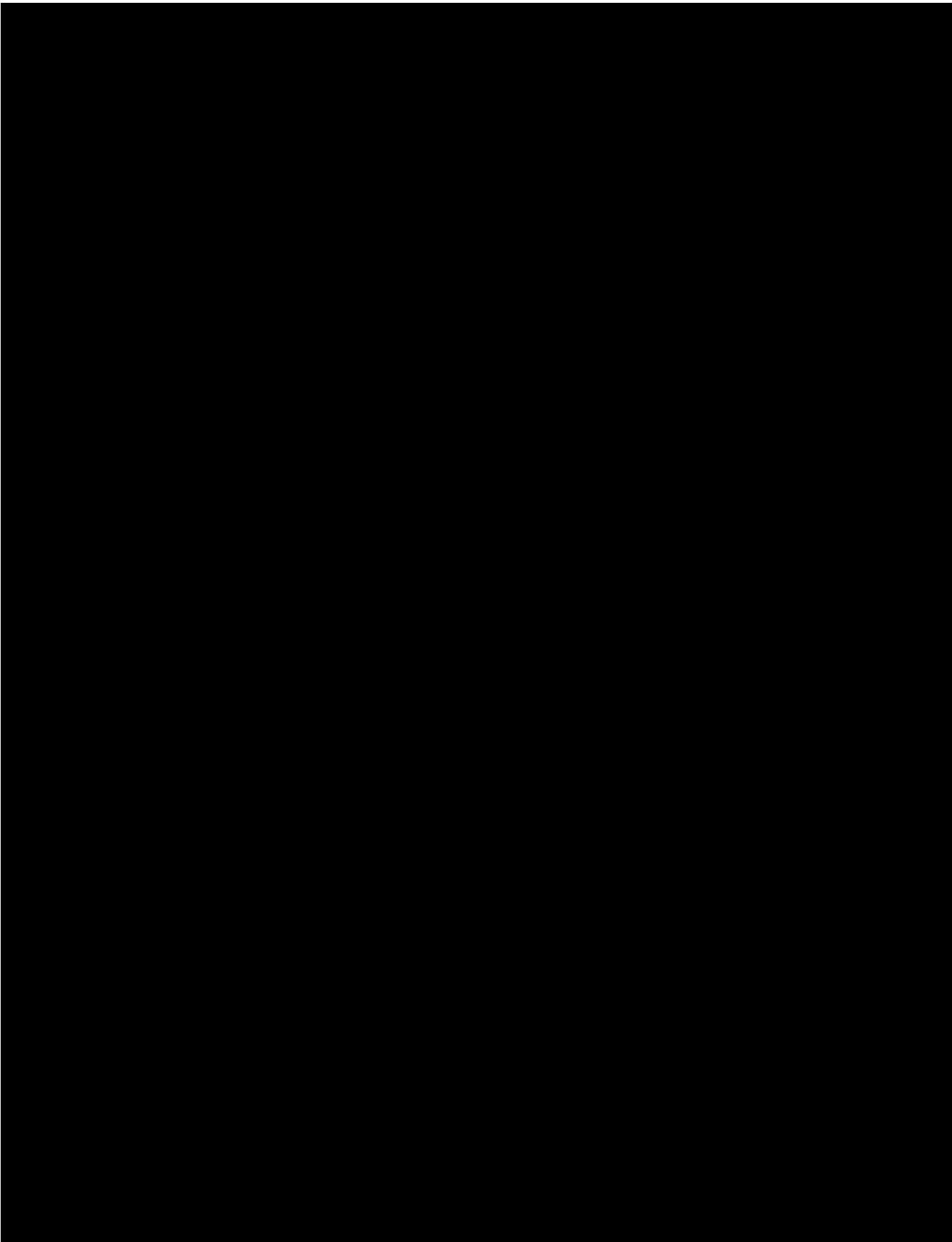
Receipting the Access Request Form

Once the Access Request Form is complete the client record is created or accessed (if already exists) in Siebel. The **Eligibility Case** is created and Access Request Form information entered into Siebel.
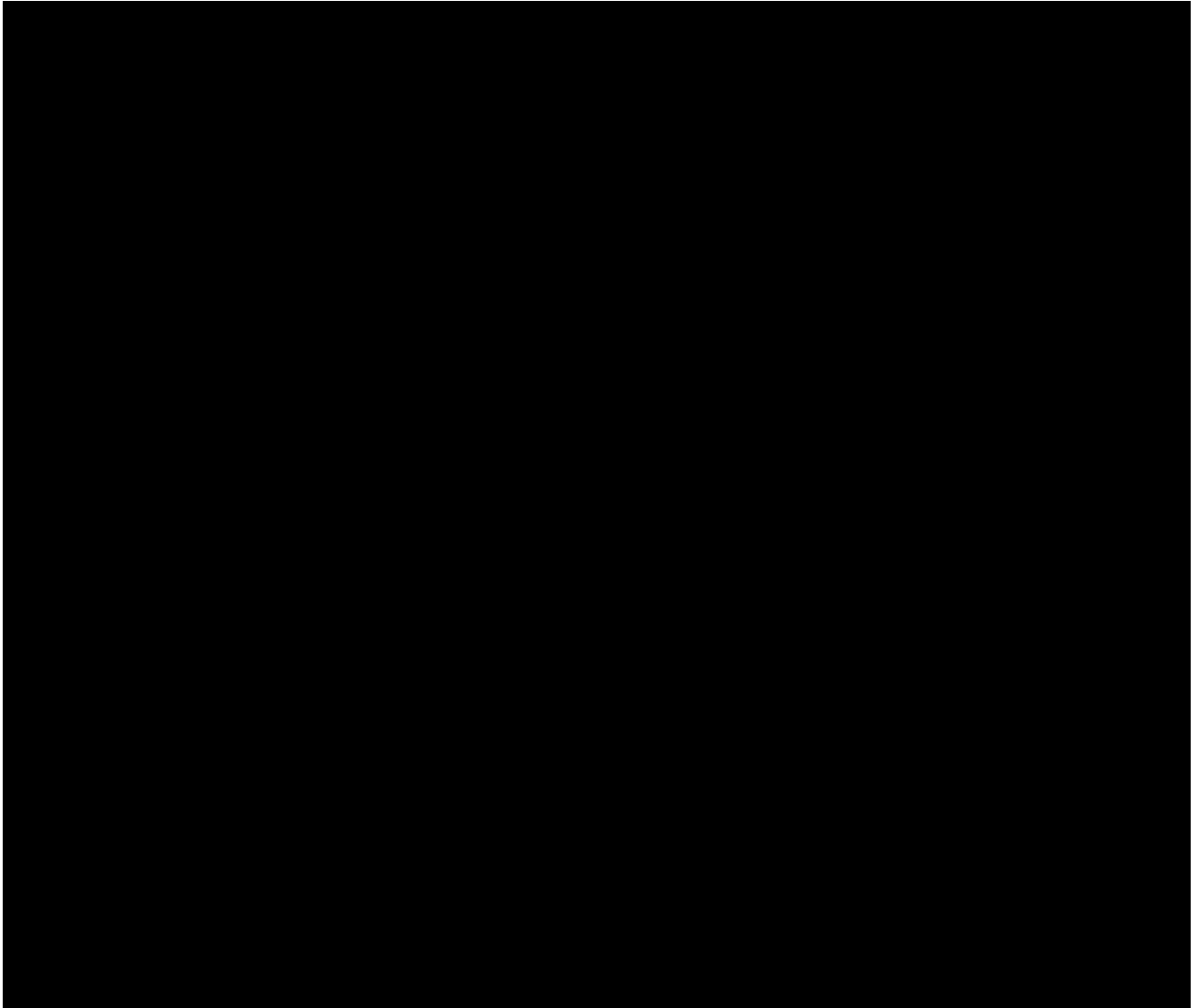
Regional Administration Officer to:

1. Open and print the MUST – DO Steps for determining access.

Creating the Eligibility case records the commencement of the 21 day time period for a decision to be made about access to the scheme. This date will be recorded in system as the Access Request Date.

! *If the form was complete when it was received, the Access Request Date will be the date the form received in Mail (mail stamp date), email or by hand (receive at location stamp).*

If the form was not complete when it was received, the access request date is the date the form is received as complete (including date missing information was received over the phone or by email).
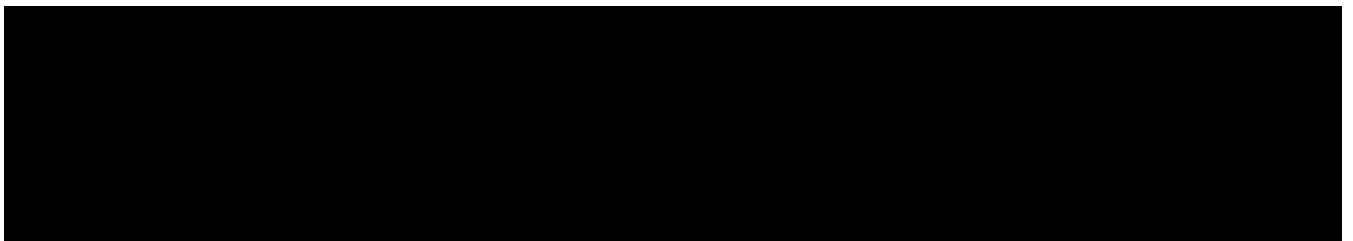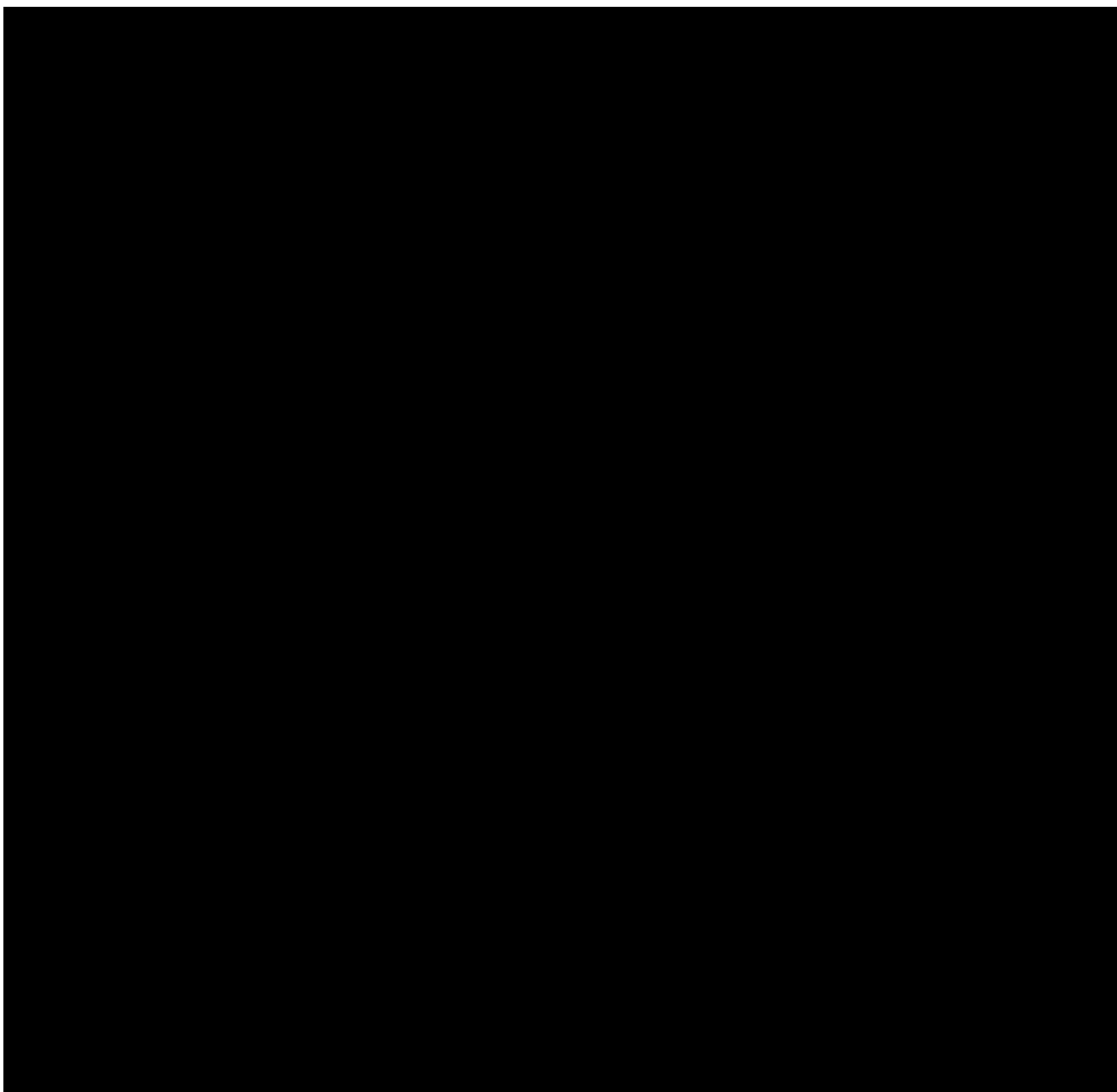
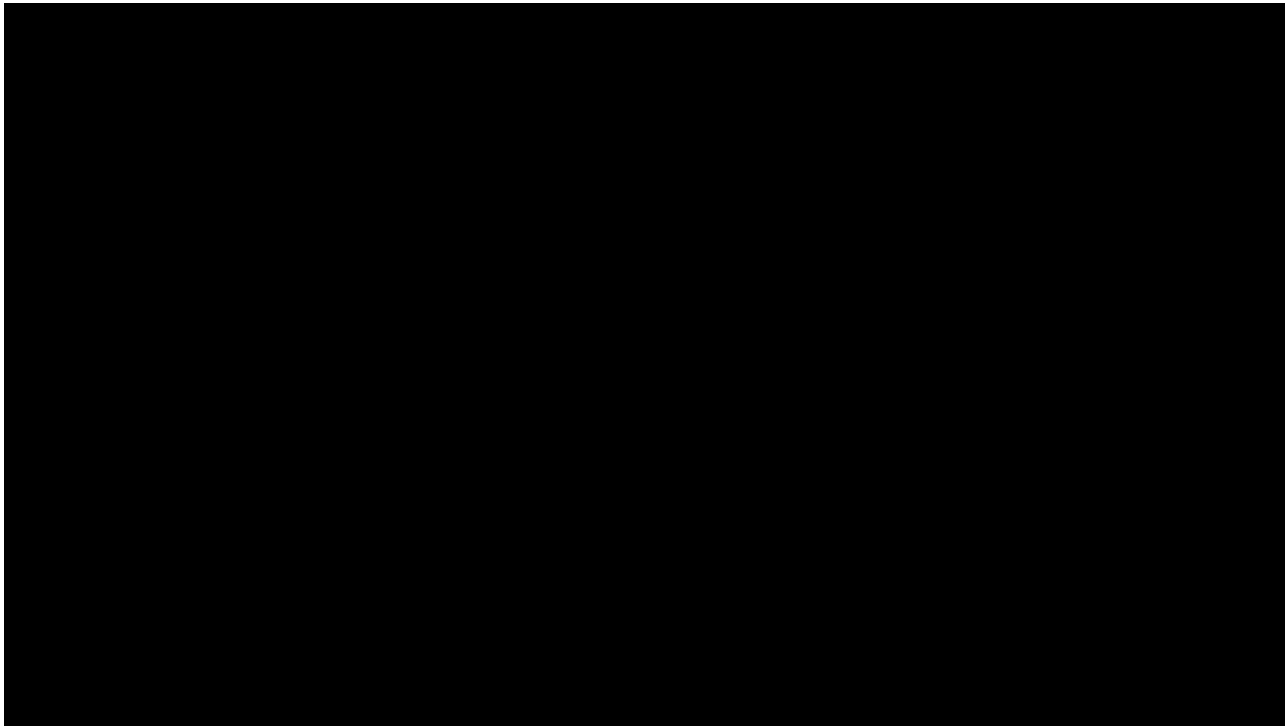*Assigning roles to contacts – definitions*

All contacts should have a defined role. It is important to assign the appropriate role to a contact to make sure that the contact receives the correct communication from DisabilityCare Australia. The role identifies the responsibility the contact has in relation to the participant. A contact can have more than one role. Not all participants will have all roles. Each contact must be given a start date and an end date.

Role	Definition
Carer *(defined in the Act)*	The person who provides personal care, support and assistance to the participant and does not provide this care, support or assistance

Role	Definition
	under a contract of service or a contract for the provision of services or in the course of doing voluntary work for a charitable, welfare or community organisation or as part of the requirements for a course of education or training.
Correspondence Nominee *(defined in the Act)*	The person who is appointed as the correspondence nominee of the participant under section 87 of the *National Disability Insurance Scheme Act 2013*. Please refer to the operational guidelines: Currently available on the DisabilityCare Australia website. Nominees – Overview Nominees – Appointing a Nominee Nominees – Duties and Removal of Nominee Nominees – Whether a Nominee is Necessary
Guardian	The person who is legally responsible for the participant. That is they are the court-appointed decision-maker. Guardian is defined under state and territory legislation.
Emergency Contact	The person who should be contacted in case of an emergency involving the participant.
Parental responsibility (In Siebel as Childs Representative)	The person who has parental responsibility for a child. That is, they are the parent of the child. A child is a person under 18 years old. Please refer to the operational guidelines: Children – Overview Children – Determining the Child can Represent Themself Children – Determining Parental Responsibility for a Child Children – Determining the Child's Representative.
Participant (self) *(participant is defined in the Act)*	The participant.

Role	Definition
Participant Supporter	A friend, relative or other person assisting the participant to develop their plan.
Plan Nominee *(defined in the Act)*	The person who is appointed as a plan nominee of a participant under section 86 of the *National Disability Insurance Scheme Act 2013*. Please refer to the operational guidelines: Currently available on the DisabilityCare Australia website Nominees – Overview Nominees – Appointing a Nominee Nominees – Duties and Removal of Nominee Nominees – Whether a Nominee is Necessary.
Plan Statement Recipient	The person who the participant consents to receive a copy of their plan statement.
Portal Access	The person who the participant consents to have access to information about them via the participant portal.
Primary Contact	The person who is the main contact for the participant.
Support Worker	The person who currently provides support to the participant.
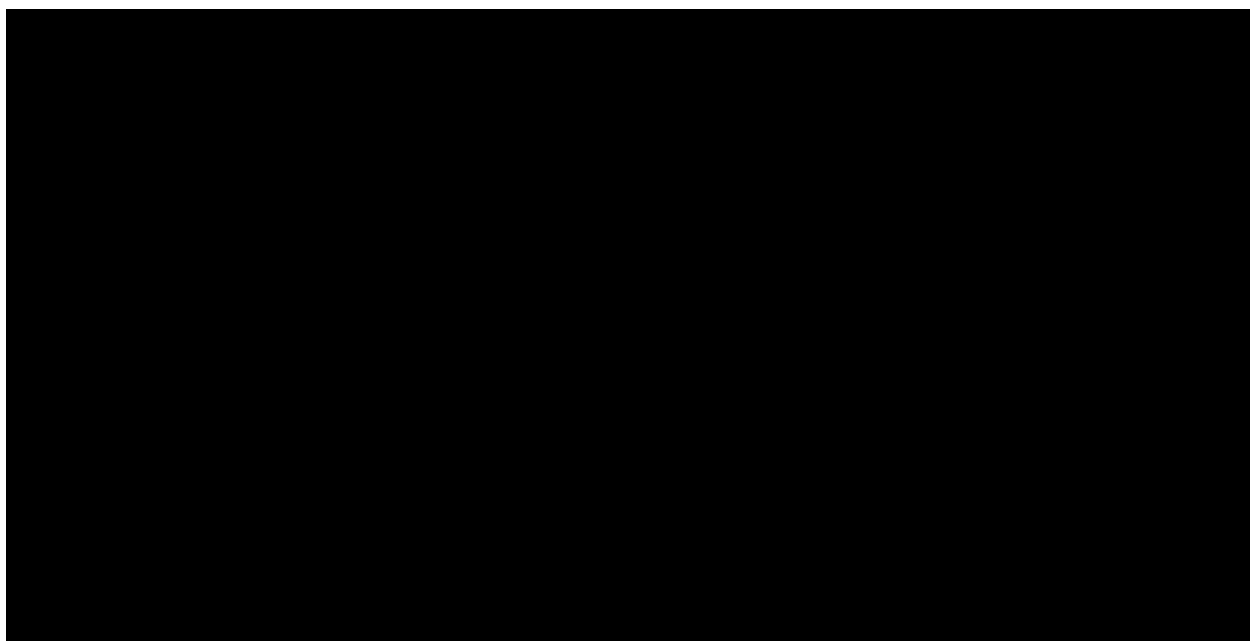
19. Site to establish an internal guideline for how cases are allocated to planners.

20. Create Letter *(letter templates)* confirming receipt of the Access Request Form there are two versions of this letter:

   - one for the prospective participant

   - one for young children where we are writing to the parent *(see Guideline on Children- Determining a child can represent themself)*

21. Send the letter to the prospective participant using their preferred method of communication, mail or email.

22. Attach the letter to the Eligibility Case.

If a data entry error is made contact the EnableIT helpdesk

! Do not change Eligibility Care status to 'Withdrawn' – this is only used to reflect a change in the participant's status not an error

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The process now passes to the Regional Support Officer (the Primary Officer) and the Planner

Access Criteria Assessment

An assessment is made against the Access Requirements for anyone who submits a Request for Access DisabilityCare Australia (including for Current clients of disability programs). The requirements are outlined in the Operating Guidelines. This process can include requesting further information and/or meeting with the prospective participant to make this assessment.

The Regional Support Officer will work with the planner to gather evidence to support the making of an access decision.

The following outlines what type of evidence is required and where evidence can be gathered from:

1. Age: The age requirements are explained in detail in the *Operational Guidelines for Access: Age Requirements*. Age requirements are site specific. Evidence can be gathered from, but not limited to:

    - Proof of identity documents
    - Centrelink system

2. Residence: The residence requirements are explained in detail in the *Operational Guidelines for Access: Resident Requirements.*

    i. Evidence can be gathered from, but not limited to:

    - Proof of identity documents
    - Centrelink system

Checking Visa status

The Visa Entitlement Verification Online (VEVO), run through the Department of Immigration allows input of information to identify whether a Visa holder has permanent or temporary residency status. The international prospective participants' international passport number or ImmiCard number is required.
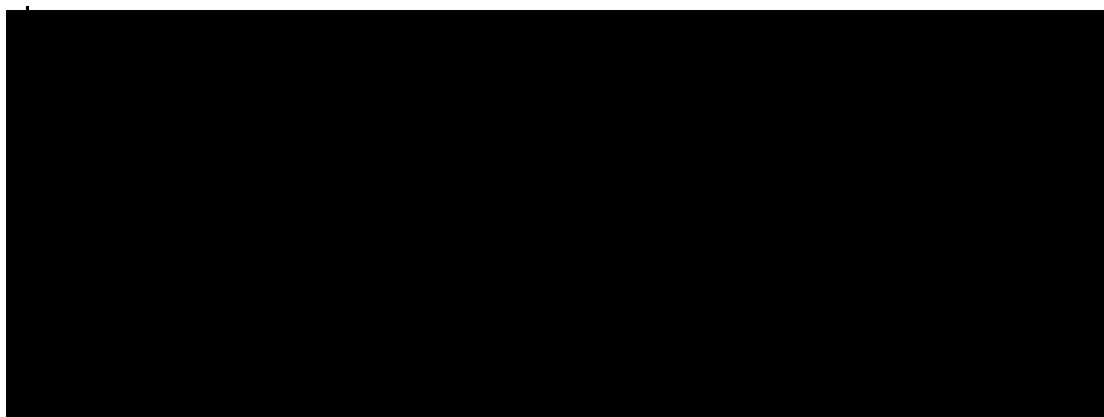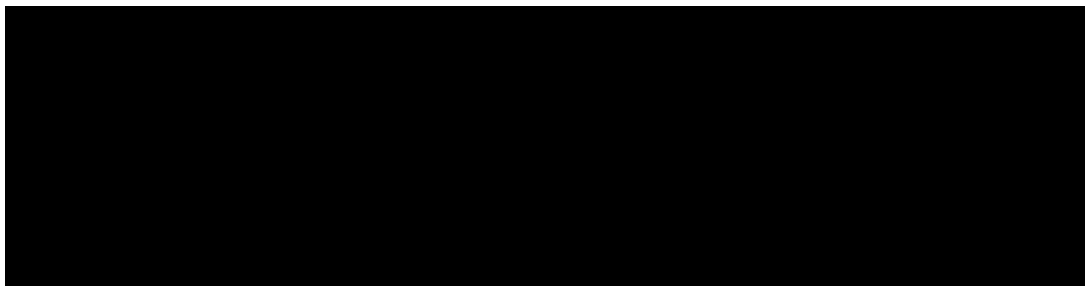
If the person does not meet both the age and residence requirements, the access decision can be made and there is no need to assess the disability and early intervention requirements.

!   **The prospective participant must meet age and residence requirements AND either the disability OR early intervention requirements**

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3. Disability requirements and early intervention: The criteria are explained in detail in the *Operational Guidelines for Access: Disability Requirements and Early intervention requirements.* Evidence can be gathered from, but not limited to:

   📖   Use the Decision tree for disability and early intervention requirements

   📋   Use the requirements checklists adults or child version

- Diagnostic or assessment information provided
- Medical assessment/Diagnostic information provided by the prospective participant
- Assessments from their current provider/s, with consent
- Assessments from their DHS records, with consent
- talking with the person and the person's family, carers and their medical practitioners, with consent

The Support Needs Assessment Tool can be used to assess extent of reduced functional capacity.

!   *Where the available information is not sufficient for a decision to be made, a request for further information or an appointment can be made. The planner can also request the prospective participant to undergo a specialist assessment. See the operational guidelines for full detail of when this may happen. If the person refuses to provide further information or undergo a specialist assessment a decision should be made on the basis of the information available. You should explain to the person that this will occur.*

Consent to gather information

1. The Access Request Form asks for consent to gather information from the Department of Human Services (accessed via the Centrelink Mainframe). The client record may have the CRN, and the consent recorded in the **Eligibility Information** Tab under **Consents.**

   📖 Use the detailed instructions for looking up information in the Mainframe in Centrelink Mainframe Information for DisabilityCare Australia Staff (User Guide)

2. The Access Request Form asks for consent to gather information from other sources, this information can be found in the **Eligibility Information** tab under **Consents**. This includes consent to access information from, but not limited to:

   a) Service providers

   b) Schools

   c) Doctors

   d) Any other person or organisation listed on the Access Request Form.


! *To obtain information from other sources (other than Centrelink) a copy of the Part E2 'Exchange of information with the other source's (for Barwon this is Part E3 or E2 for Victorian Government Departments): This consent to gather information must be provided to the provider/school/doctor as proof of consent to collect information.*

Templates are created under the **Eligibility Case** tab in Siebel to record information, evidence gathered and assessment detail.

Regional Support Officer or Planner to:
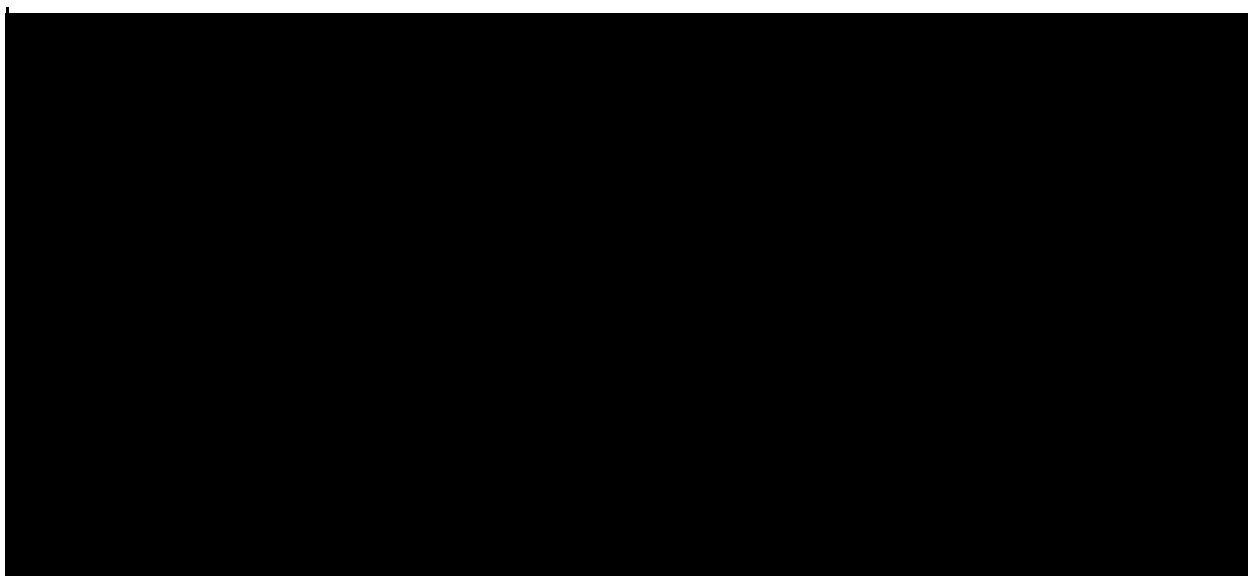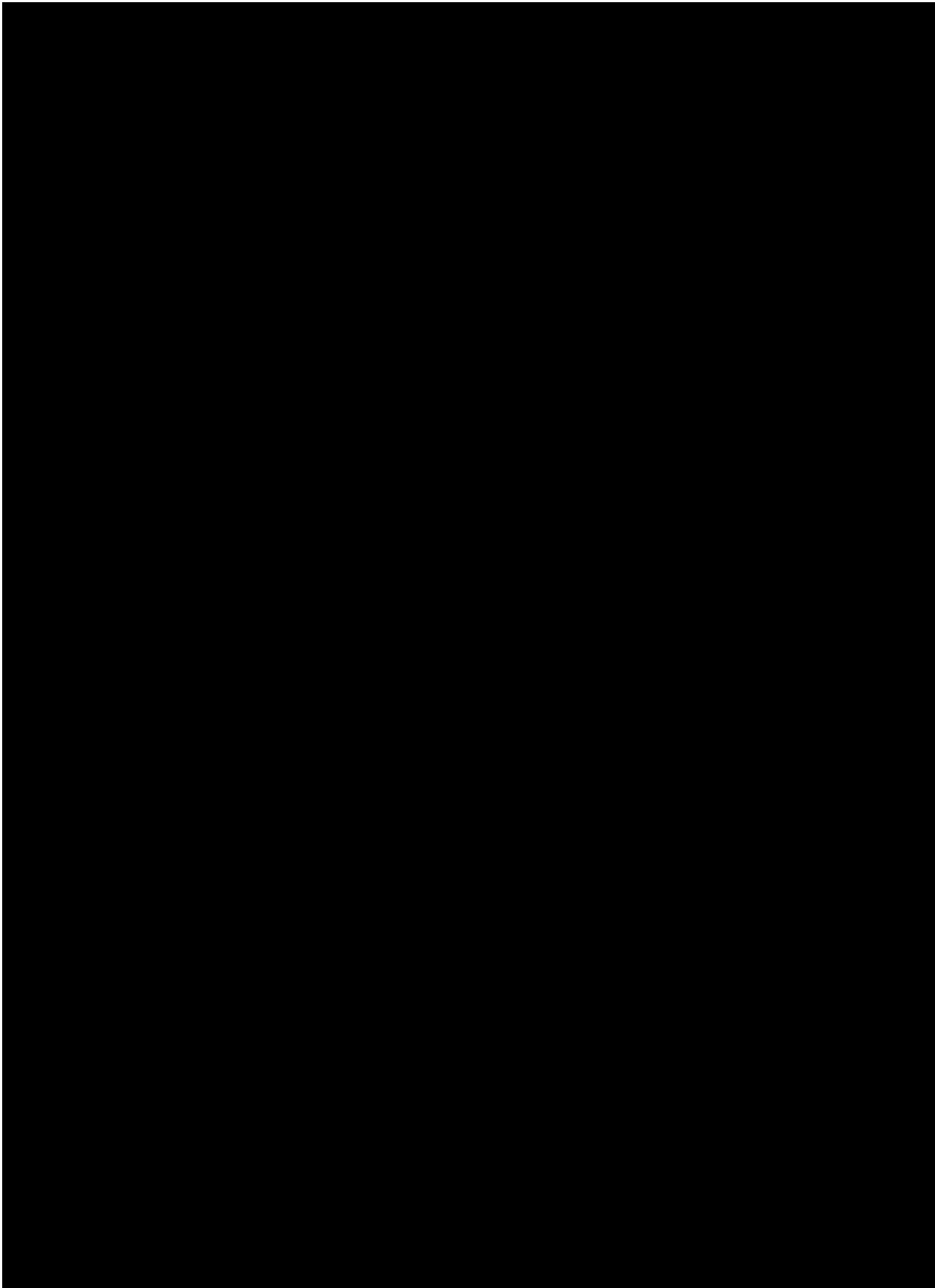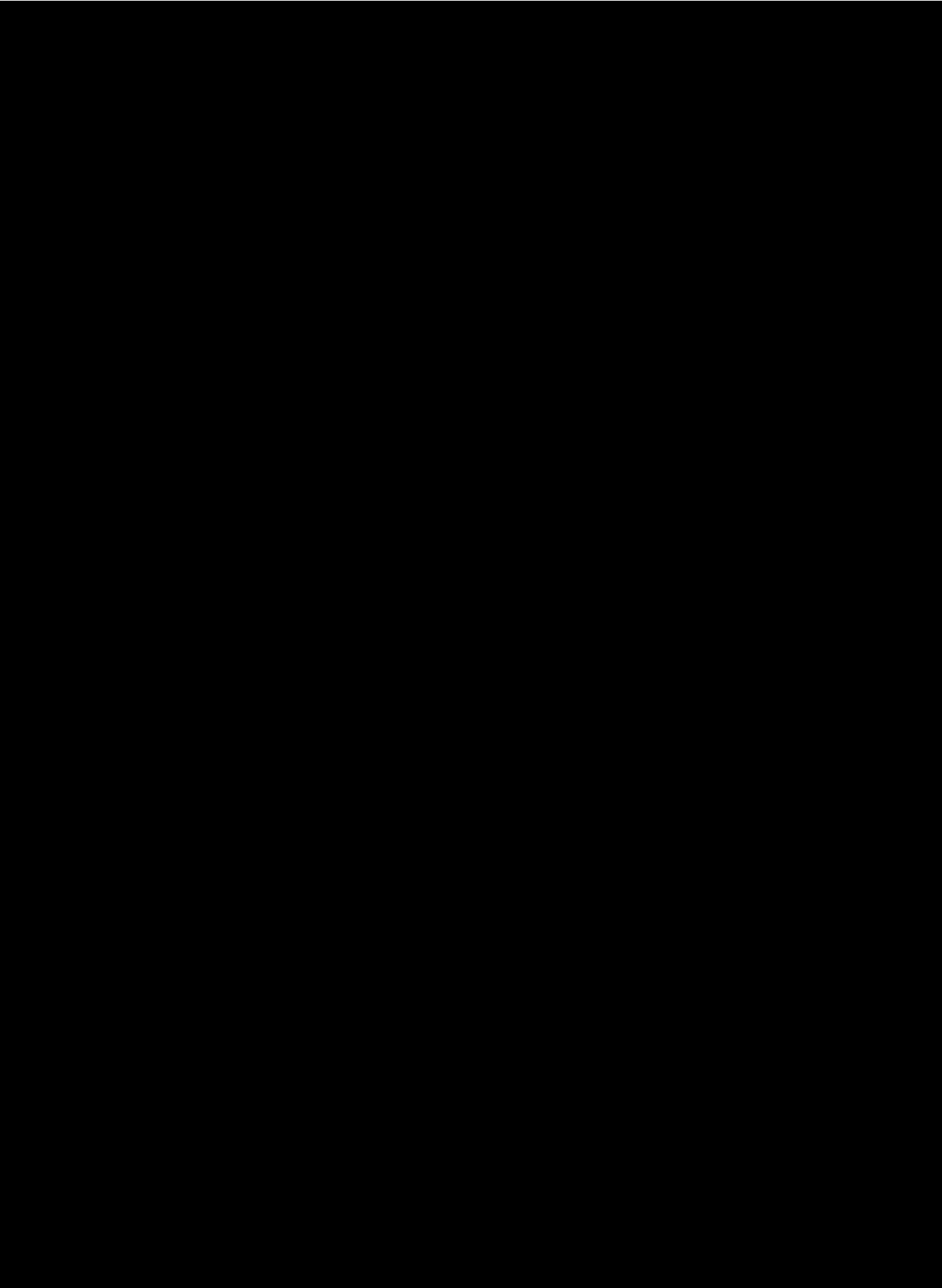
8. Refer a decision to delegate for approval, if not completed by planner

This supports the Operating Guidelines for: Age requirements, Residence requirements, Disability requirements, Early Intervention requirements

The process now passes to the Planner for the Decision to be made

Make Access Decision

Once enough evidence to support the making of an Access Decision and the status has been changed to Ready for Approval. The Planner must make an Access Decision. The planner is delegate and must be satisfied that the decision is correct before approving. This is a reviewable decision under the legislation.

Planner to:

If the prospective participant is **Eligible**:

5. Create an Access Decision Letter informing of outcome *(letter templates).* There are four templates for the letter for people who meet the access requirements – a child and adult version for meeting the disability requirements and a child and adult version for meeting the early intervention requirements.

6. Fill in all letter details as required, use the DisabilityCare number as the NDIS Number.

7. Send the Access Decision Letter and a Planning Kit using their preferred method of communication, mail or email. The planning kit includes:

    a) the brochure **My Pathway, My Choice**

    b) a template for completing the participant's statement of goals and aspirations (adult or child version dependent upon the age of the participant)

    c) a fact sheet on developing and completing the participant's statement of goals and aspirations (adult and child versions)

    d) a fact sheet on planning and assessment, and

    e) Factsheet, complaints feedback and review rights

    f) Bank Account Detail Form

8. Call the participant, and provide an explanation of the decision and advise of the letter and information being sent.

9. Get an indication of when the participant would like to be contacted to set up an appointment or offer two time slots to ensure enough appointments are complete on time

If the prospective participant is **Not Eligible**:

10. Create an Access Decision Letter informing of outcome

> *There are 16 versions of the letter depending on whether the person is an adult or child and which access requirements were not met, and whether the person will receive continuity of supports. Be careful the correct template is selected.*

11. Creating the letter:

    Choosing the template (*letter templates*)

    a) Is the letter to the person with disability or is the letter addressed to the parent(s) of a child with disability?

    b) Which of the access requirements were not met?

    c) Are they a current client of disability programs? If yes a <u>continuity of supports letter template</u> must be used. To complete the letter detail use:

        • For Commonwealth Program – Look up program detail for whether the program is continuing (See the program factsheet or Part 5 of these SOPS)

        • For State Program – please email Carl Segale for advice CC Deborah Winkler.

12. Complete the details in the letter carefully. Remember that this is a reviewable decision.

13. All Access Decision Letters require approval from the Director, Service Delivery or from a Senior Planner.

14. The Director, Service Delivery or Senior Planner needs to confirm:

    a) The letter is the correct form

    b) All options included in the letter are correct, and

    c) Citing of all information provided by the prospective participant is correct.

15. Send letter and attachments, factsheet on access requirements and Factsheet on review rights, using their preferred method of communication, mail or email.

16. Call the participant, and provide an explanation of the decision and advise of the letter being sent.

Protected participants

DisabilityCare Australia has a responsibility to ensure that prospective participants and participants who need to protect their name or address are provided with appropriate options to do so and are informed of these options in a timely and respectful manner.
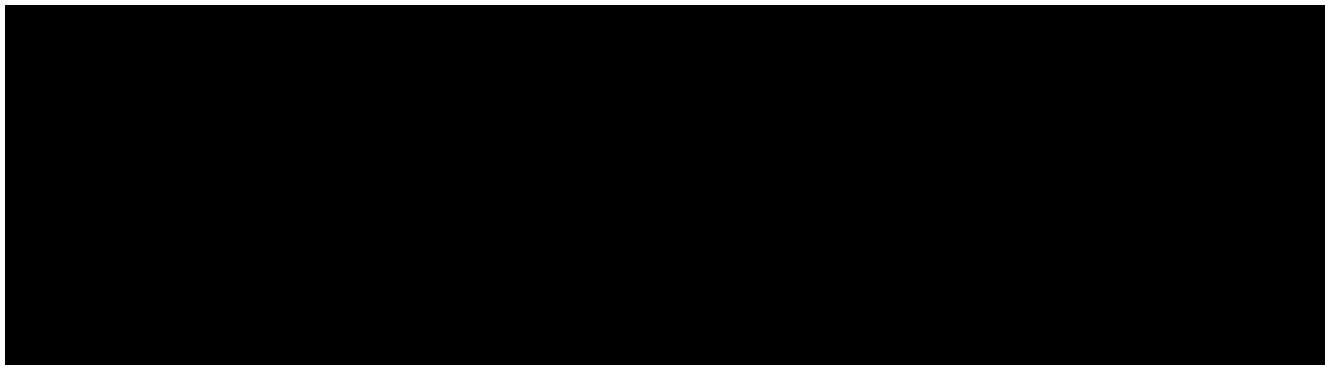
Prospective participants and participants who need to protect their name or address may include:

- Public Figures, those in public life or their immediate family
- Staff of DisabilityCare Australia or their immediate family
- DisabilityCare Australia Board or Advisory Council members or their immediate family
- Those who require a protected address, eg as a result of a family violence order

These people are referred to as "protected participants".

The process for protected participants is the same as for any other prospective participants and participants except as specified below to provide an additional level of privacy protection for them. It is expected protected participants will generally identify themselves as part of an enquiry by phone or in person either before or after completing My Access Checker.

It is the responsibility of the Launch Manager to assign protected status to an individual. The General Manager, Governance will establish a protocol with the DisabilityCare Australia Board and Advisory Council members allowing them to seek protected status before contacting the sites for access determination should they wish to do so.

Enquiries by phone or in person

If a prospective participant either directly or indirectly discloses they are a public figure, a Board or Advisory Council member or immediate family member of a Board or Council member, refer them to the Launch Manager who will then assign a Senior Planner as their contact officer.

If the person is a staff member of DisabilityCare Australia or immediate family of a staff member, the person is to be referred to the Launch Manager who will then arrange for a Senior Planner from another site to be assigned as contact officer.

It should be explained to the prospective participant they can have their name and/or contact details protected. Depending upon the circumstances, some protected participants may be comfortable with using their real name and/or contact details.

The senior planner should follow the same processes for assisting a prospective participant by directing them to complete the My Access Checker and/or providing them with an Access Request kit.

Receipting the Access Request Form

When an Access Request Form is received, the Senior Planner to:

1. Open and complete the Protected participant form, and select a pseudonym for the person

2. Follow the Receipting the Access Request Form process (page 31) from Step 4 Create a new client
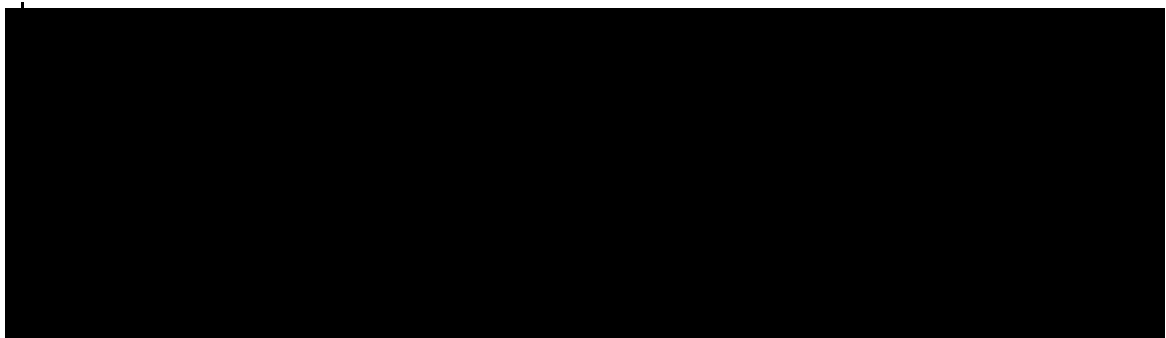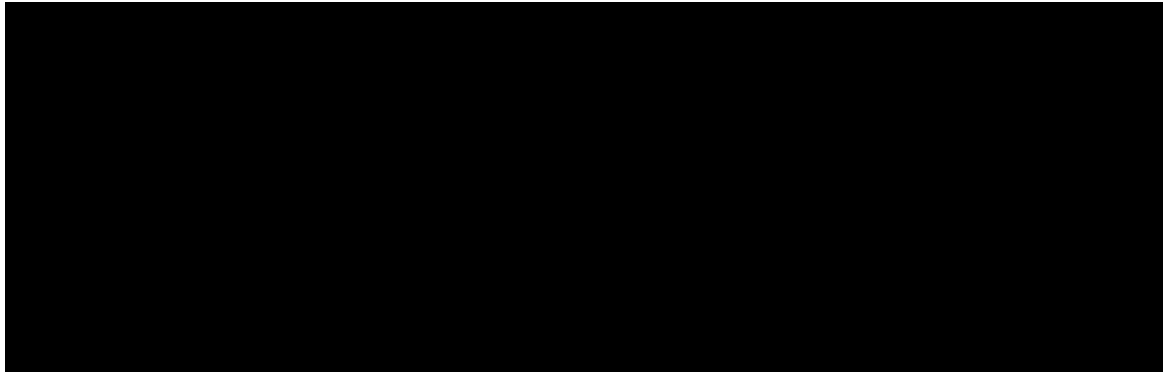
3. Create a folder in the restricted workspace in the name of the person (format surname, first name)

4. Save the Protected participant form, the MAC and the Access Request Form in the folder

5. Create Letter *(letter templates)* confirming receipt of the Access Request Form there are two versions of this letter:

   - one for the prospective participant

   - one for young children where we are writing to the parent

6. The letter should be sent to the person's Actual name

7. Add the pseudonym to the letter

   - Current wording

     Your DisabilityCare Australia Access Receipt number is [Person Number].

   - Replace with

     Your DisabilityCare Australia Access Receipt number is [Person Number]. DisabilityCare Australia creates alias in the system to protect your anonymity, your alias is [NAME].

8. Send the letter to the prospective participant using their preferred method of communication, mail or email.

9. Save a copy of the letter to the restricted folder.

Access Criteria Assessment/Make Access Decision

The Senior Planner will be the delegate for making an access decision. The Senior Planner to:

1. Follow the Access Criteria Assessment process (page 42)

2. The Disability and Early Intervention Access Decision Tree needs to include the pseudonym and be attached to the record Siebel

3. Any other supporting information will need have the name replaced with the pseudonym or, if not possible, store in the person folder in the restricted workspace

4. Ongoing contact with protected participants should be through the Senior planner or Planner who has been working with the protected participant

5. Once the assessment is complete follow the Making Access Decision process (page 47)

If the prospective participant is **Eligible**:

6. Create an Access Decision Letter informing of outcome *(letter templates).*

7. Fill in all letter details as required, use the DisabilityCare number as the NDIS Number.

8. Add the pseudonym to the letter

   • Current wording

   Your DisabilityCare Australia number is [NDIS Number]. Quoting this number when you contact DisabilityCare Australia will assist us to find your record more quickly.

   • Replace with

   Your DisabilityCare Australia number is [NDIS Number]. Quoting this number when you contact DisabilityCare Australia will assist us to find your record more quickly. DisabilityCare Australia creates an alias in the system to protect your anonymity, your pseudonym is [NAME].

9. Send the letter to the prospective participant using their preferred method of communication, mail or email. Including the Planning Kit.

10. Save a copy of the letter to the restricted folder.

If the prospective participant is **Not Eligible**:

11. Create an Access Decision Letter informing of outcome

12. Send letter and attachments, factsheet on access requirements and Factsheet on review rights, using their preferred method of communication, mail or email.

13. Save a copy of the letter to the restricted folder.

> **!** *For staff members or their family, the Senior planner can now allocate the Eligibility case to a planner to continue the process.*
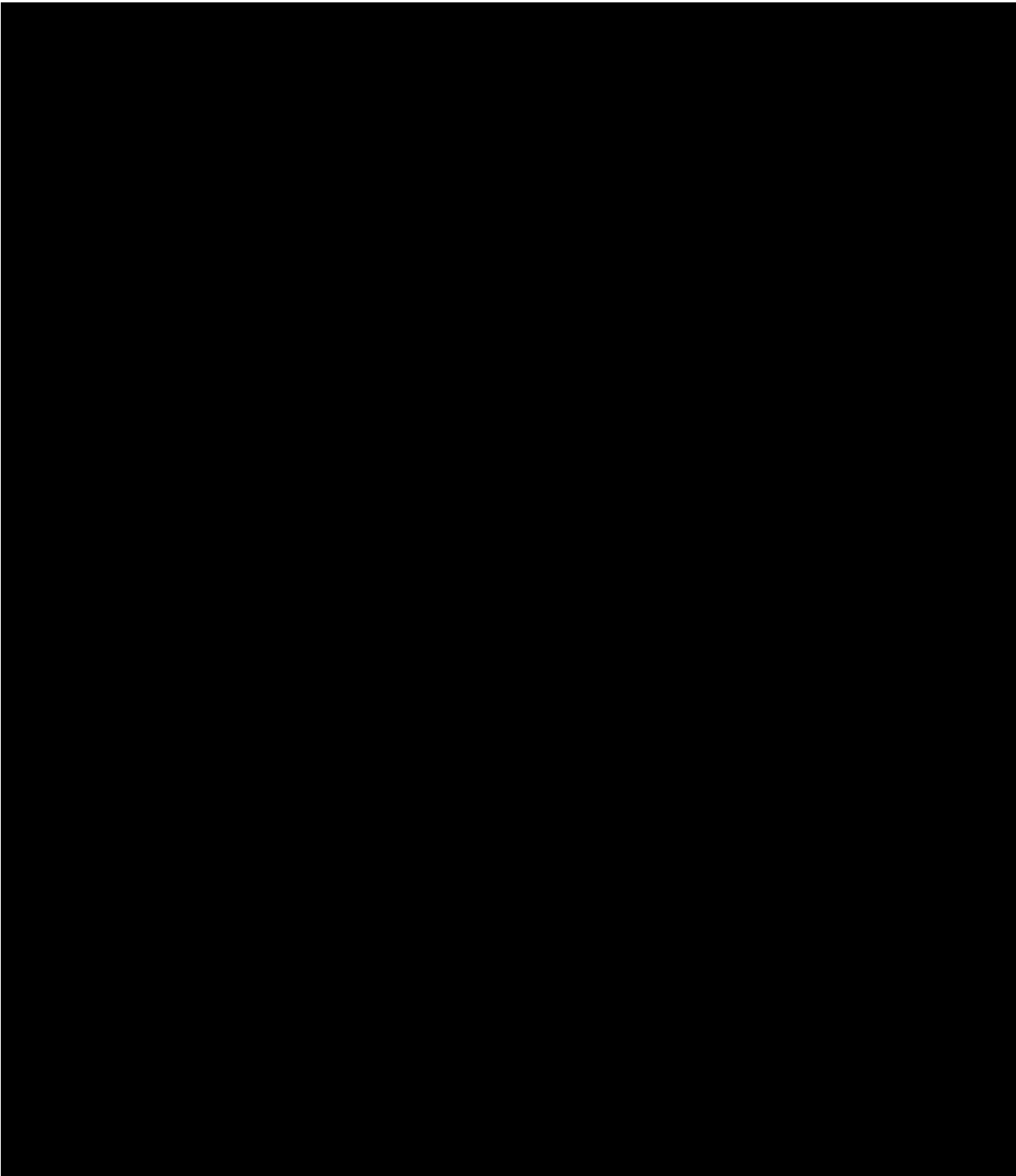
How to establish Proof of Identity

A participant must establish proof of identity to access the scheme. Staff must sight identity documents and record the nature of those documents in Siebel.

If a prospective participant has provided consent for DisabilityCare Australia to access their Department of Human Services records, staff should access this information through the Centrelink Mainframe before requesting other types of documents. The consent is recorded on Part E of the Access Request Form or on the client record in Siebel on the consent template under **Eligibility Information**.

The Proof of Identity Check assists with what documentation needs to be collected. The point numbers against each type of document are for internal system use only.

If Centrelink records are available the participant only needs to provide one other form of identification. The fact there is an existing client record on Siebel, even if it includes a CRN, does not mean Proof of Identity for the person has been established. A CRN can be created for the purpose of booking an appointment or for someone receiving Family Tax Benefit, where no Proof of Identity is required.

You can only use the information provided to Centrelink for Proof of Identity purposes if the person has consented to us obtaining this information from Centrelink. The Centrelink Mainframe Information for DisabilityCare Australia Staff (User Guide) explains what information can be used to establish Proof of Identity.

Alternatively, if the person consents to DisabilityCare Australia obtaining information from their service provider we can obtain it from that provider.

> **!** *When talking to participants do not refer to the point values. ie advise they need to bring in their birth certificate and Medicare card (not 100 points of ID).*
> *The factsheet How to become a participant of DisabilityCare Australia, provides information on what documents they should bring.*

Centrelink Mainframe information

DisabilityCare Australia has access to the Centrelink Mainframe to source relevant information about proof of identity, age, residency, medical conditions, care needs, payment details or other information necessary to determine if they can become a participant. The Centrelink Mainframe Information for DisabilityCare Australia Staff (User Guide) provides detail about how to access and

view information in the system. A number of Regional Support Officers and Planners have access to the Centrelink Mainframe.

A staff member needs to look up the Centrelink record and provide detail of what relevant information is available.
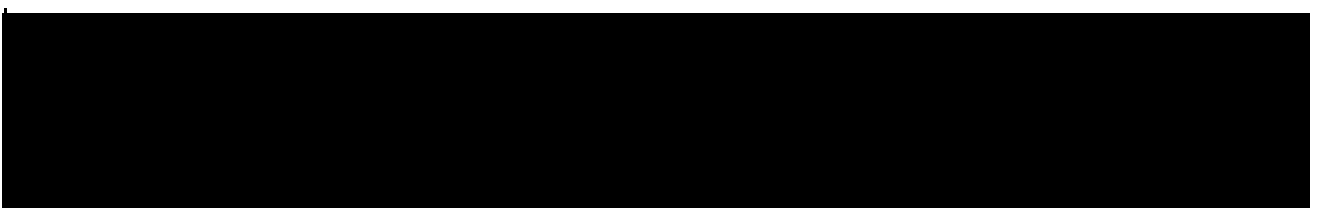
> 📖 Use the detailed instructions for looking up information in Mainframe in Centrelink Mainframe Information for DisabilityCare Australia Staff (User Guide). The user guide contains detailed instructions on how to interpret the information stored on the Centrelink Mainframe and how to complete the relevant fields in Siebel. Staff **must** read the user guide and complete the training contained in the user guide (i.e. logging on, logging of and scenarios) before accessing the live Centrelink Mainframe.

This detail needs to be recorded in Siebel.
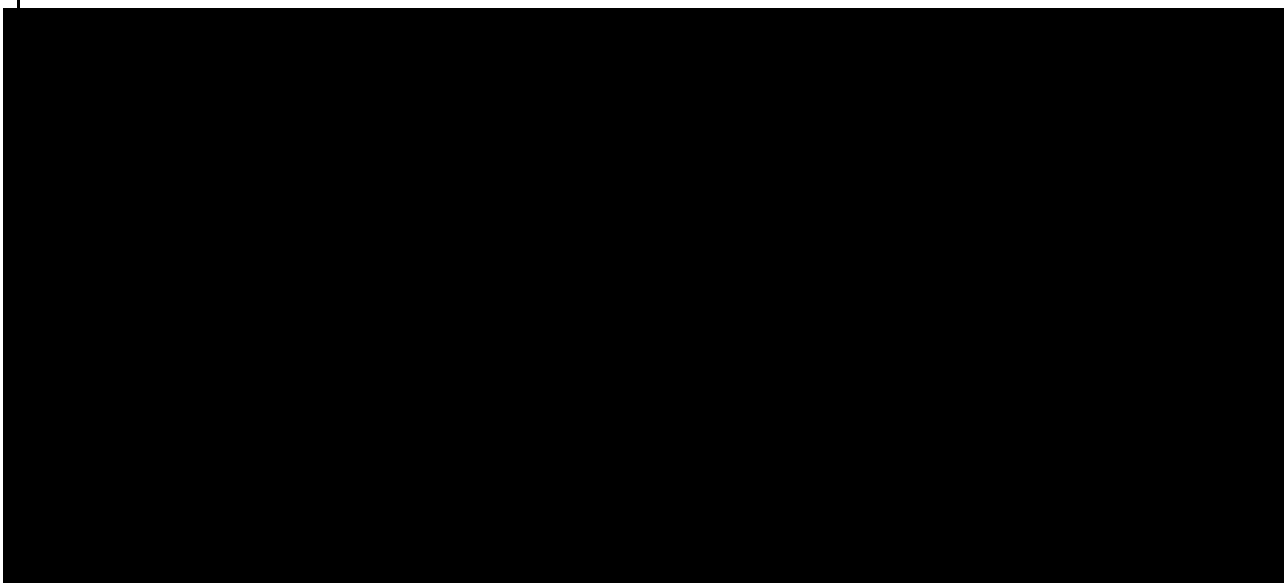
Gaining Access to the Centrelink Mainframe

A restricted number of staff will be given access to the Department of Human Services, Centrelink Mainframe. Access to the Centrelink Mainframe is strictly limited to staff who have a legitimate business purpose directly related to the official duties of their position. If you think you require access to the system please contact your Director, Service Delivery.

Staff **must** read the User Guide. and complete the training contained in the user guide (i.e. logging on, logging of and scenarios) before accessing the live Centrelink Mainframe. The user guide contains detailed instructions on how to interpret the information stored on the Centrelink Mainframe and how to complete the relevant fields in Siebel.

The DHS Inadvertent Access Notification Form for DisabilityCare Australia Staff is to be completed by staff who, during the course of their usual duties while using the Centrelink Mainframe inadvertently access information of a family member, friend, close personal acquaintance, neighbour or other person where a conflict of interest exists. If this happens the staff member must remove themselves from the situation, immediately tell their supervisor and immediately complete this form and email it to the Department of Human Services.

For further information on gaining access to the Centrelink Mainframe and inadvertent access, please refer to the User Guide.

Identity documents

When a participant brings documents or certified copies to the office:

- Print a copy of Proof of Identity checklist

- Fill in all required details on the form for all the documents

- Return documents to the participant

> **!** *Proof of Identity documentation will be required for the child and their parent, guardian or nominee.*

Record Proof of Identity Information in Siebel

All information from Proof of Identity documents must be recorded in Siebel

The Regional Support Officer to:

1. Open Siebel

2. Open the client record

3. Record detail of Proof of Identity on the **Identity Verification** tab

📖 Use the detailed instructions for completing this tab in the QRG C. Siebel - Record identity Verification

❗ *DisabilityCare Australia does not keep copies of Proof of Identity material, with the exception of authorised referee reports (See below).*

Proof of Identity for newborns

For newborns (under 3 months) who do not yet have a birth certificate or Medicare card, it is acceptable to rely solely on the Health Record (blue book) as the child's Proof of Identity and allocate 90 points in the system. A full Proof of Identity is required for the mother.

The following health records can be accepted:

- NSW: "My First Health Record" Personal Health Book (blue book)
- SA: "My Health Record"
- Barwon: Victorian Child Health Record (blue book)
- Equivalent books from others states

Parents have 60 days to register the birth, so it is expected that newborns from 3 months will have a birth certificate.

The Regional Support Officer to:

1. Check child's name, date of birth and name of mother have been completed correctly in the heath record and signed by a doctor or midwife
2. Complete a Proof of Identity check on the mother and ensure her name matches the baby's health record
3. Record the detail from the health record in Siebel

📖 Use the detailed instructions for completing this tab in the QRG C. Siebel - Record identity Verification

- Record "Baby health book" against the Birth Certificate detail in the identity number field

Authorised referee report

An authorised referees report, where provided by the participant in place of other proof of identity needs to be scanned and saved in SRMS. The detail should be recorded into Siebel on the **Identity Verification** tab. The document needs to be attached to the client record on the attachments tab.
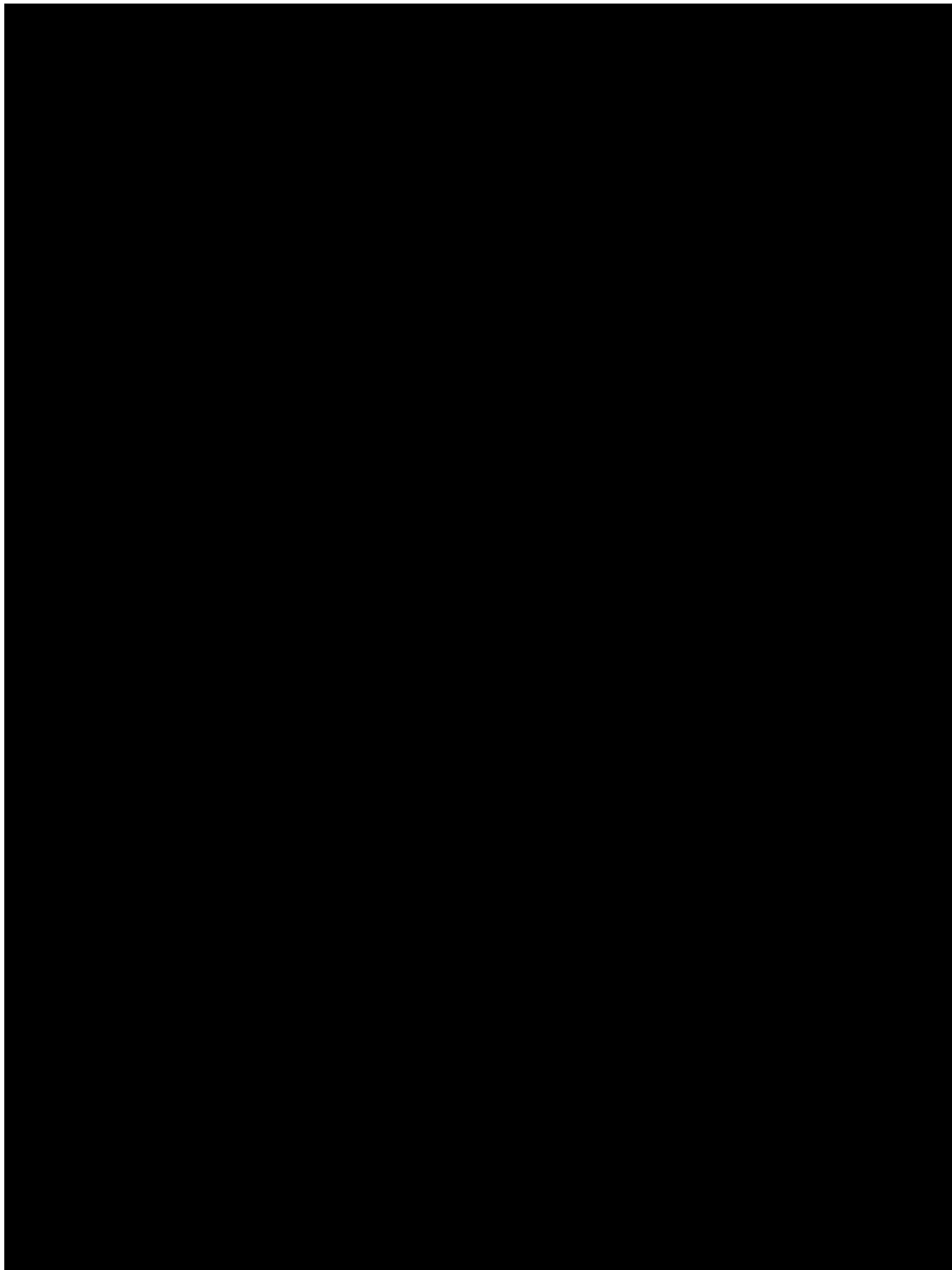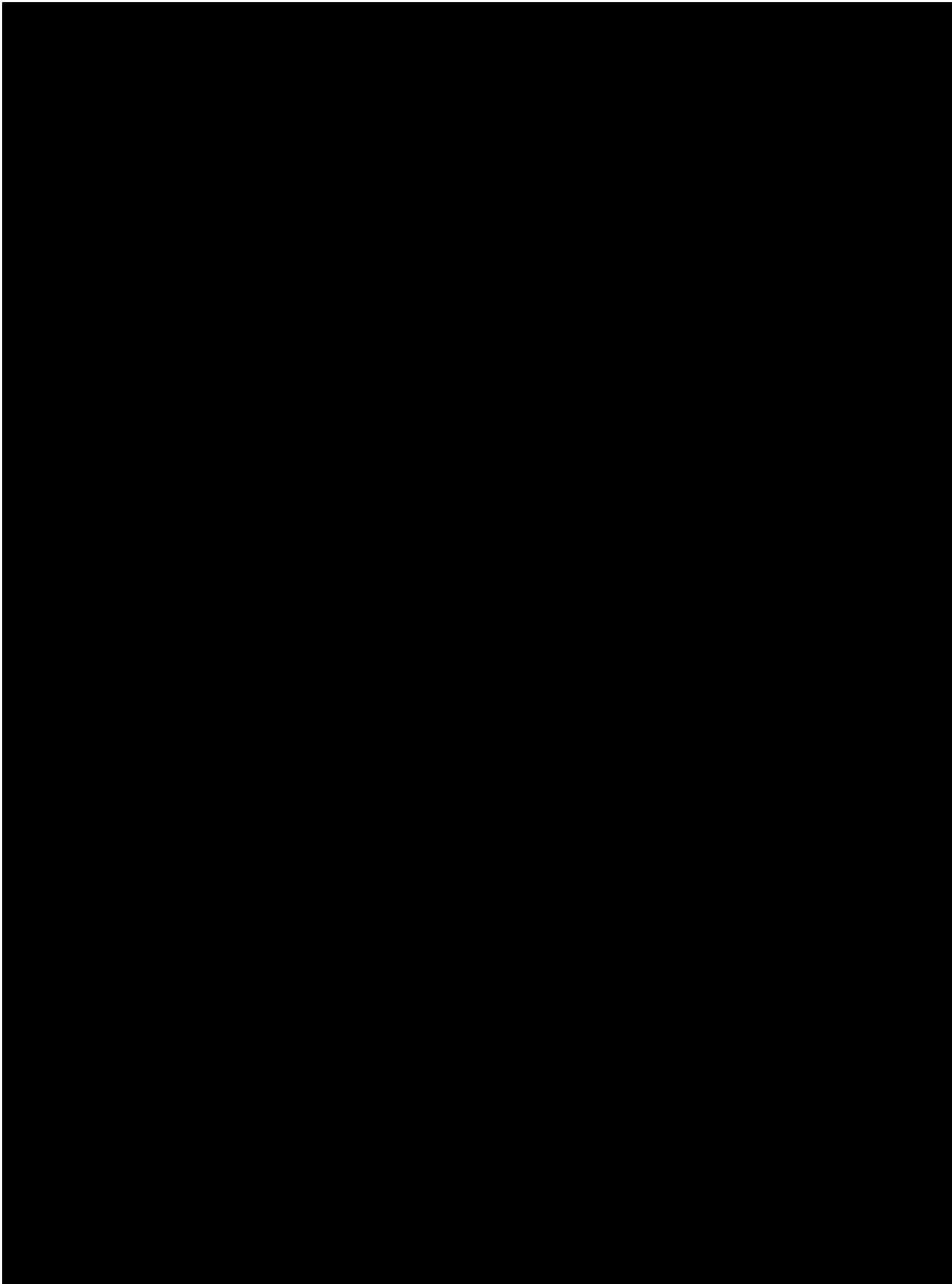
Interpreter Services

For people who do not speak English

DisabilityCare Australia will initially be using the Department of Immigration and Citizenship's Telephone Interpreting Service (TIS) as the interpreting service for people with disability who do not speak English.

http://www.immi.gov.au/living-in-australia/help-with-english/help_with_translating/

There are two ways to connect to an interpreter:

Talk directly with the TIS Service