Knowledge Article

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Guide – Safeguarding the participant's interests

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

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

- risks and safeguards
- pre-planning considerations
- risk assessments and plan duration
- planning considerations.

For risk assessment and safeguarding practices for NDIS applicants, use these resources:

- the PACE – Access Pre-decision Quality Check Guide on the Participant journey Intranet page
- article Request priority eligibility decision
- Our Guideline – Applying to the NDIS.

Recent updates

07 April 2026

PEC case question age range changed to younger than 9 to align with system change

Linked article name update

24 November 2025

Guidance updated to acknowledge a linked article name change from 'Guide – Psychosocial disability' to 'Understand psychosocial disability'.

Before you start

You have read and understood:

- Participant safeguarding policy (external)
- article Guide – Safeguarding the participant's interests – Context and background
- article Guide – Conversation style guide
- article Identify risk factors and vulnerabilities

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- Our Guideline – Creating your plan (external)
- Our Guideline – Your plan (external)
- Participant critical incidents.

Risks and safeguards

Risk and safeguard assessments happen during the planning process. Planner delegates look at all the information to create a plan that meets the needs of the participant. This can include:

- reviewing participant information
- requesting further information or reports
- thinking about the budget and plan length
- making plan management decisions
- conducting the plan meeting
- assessing risks and safeguards.

A general principle which guides actions under the NDIS Act is to support people with disability to exercise choice and control. This includes choice in how they pursue their goals during the planning process and how we deliver their supports. This also includes being able to take reasonable risks. You can learn more about choice, control and dignity of risk in the Participant safeguarding policy (external).

An NDIA function is to make sure there's a reasonable balance between safety and the participant's right to be part of activities that involve risk.

To manage the risk, the NDIA puts safeguards in place with a minimum of necessary restrictions. This is to balance the safety of the participant with the risk of harm. This recognises their ability to take reasonable risks and make reasonable mistakes, giving participants choice and control over their life.

The participant's plan meeting is an opportunity for open conversation. While developing their plan, you may identify actual and potential risks. Together with the participant, you can explore a range of safeguards and support mechanisms to minimise or mitigate risk. These could be:

- **Choice and control** – participant empowerment to make their own decisions about their supports and how funding in their plan is managed.
- **Risk-based and person-centred approach** – safeguards are proportionate to the actual level of risk the participant faces. This is based on their functional capacity, natural support network and available supports.

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- **Capacity presumption** – the participant is presumed to have the capacity to exercise choice and control, with support to be provided to develop and exercise this capacity.

To reduce the participant's potential exposure to harm or to manage the exposure, they're encouraged to develop their own strategies and safeguards. Use the following safeguard levels to guide the development of appropriate measures:

- **Individual safeguard level** – informal and formal – Informal safeguards recognise the participant is more likely to be safe when they're actively involved with their family and the community. The things that make people safe can be seen as the same things that are needed to have a good life. For example, caring relationships and increased chances to be part of daily life. Formal safeguards include restrictive practices and serious incident reporting.
- **Service safeguard level** – include quality frameworks, complaint mechanisms and workforce requirements. For example, delivery of contracted goods or services, appropriate qualifications, recruitment practices and performance standards. For many providers, an appropriate service safeguard level will be a requirement for NDIA registration.
- **System safeguard level** – the NDIA will use existing system safeguard levels to protect the participant. These include internal and external processes for complaints and to review decisions by an independent body and statutory power.
- **Community-based safeguards** – the NDIA uses and operates with existing safeguards that aren't part of the formal disability service system. These include advocacy organisations, community visitor schemes, public advocates or guardians, ombudsman offices and discrimination commissioners. People with disability can also use a range of community safeguards including anti-discrimination and consumer protection legislation.

Additional safeguards that can be included in the participant's plan are to:

- set a shorter period between plan reassessments
- establish arrangements for regular contact between the participant and NDIA
- provide funding for supports to assist the participant to manage their own plan – for example, budget training.

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Safeguards also include supporting the participant with their decision making and interactions if they require that level of support. The participant may be appointed a plan nominee, correspondence nominee, or be supported by a third party with authority and consent. To learn more, go to Our Guideline – Appointing a nominee (external).

s47E(d) - certain operations of agencies

- the person's support needs
- how the person manages daily life.

This information may highlight a participant risk and can help inform other areas of the planning process. To learn more, go to article Complete personal and environmental circumstances case.

The PEC questions will be done again for children younger than 9 by the early childhood partner during a check-in. To learn more, go to article EC Early childhood intervention supports overview.

Functional capacity assessment

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A functional capacity assessment is how we assess the impact of a person's disability on their daily activities. This information may highlight a participant risk and can help inform other areas of the planning process.

To learn more, go to article Understand functional capacity assessments.

Participant profile

The participant profile captures their environmental and personal information. The participant's interests guide the planning process, through talking about living arrangements, relationships, daily life and strengths. The participant's goals and informal, community and mainstream supports are also recorded. Where appropriate, safeguard information can be recorded in this section. For example, referral to family support services and child learning programs may be needed to reach a family-orientated goal. If any risks are identified, go to article Identify risks and vulnerabilities.

To learn more, go to Our Guideline – Creating your plan (external) and article Conduct the plan meeting – Complete the participant profile.

Risk assessment and plan duration

The risk assessment should be used to identify risks and record safeguards in the participant's life when developing the plan. Do this by asking questions and recording the information from the planning conversation and other available supporting evidence. To learn more, go to articles:

- Change plan duration
- Create and complete a participant risk assessment case.

Plan duration should be determined based on the criteria set out in Our Guidelines – Creating your plan (external). We might give a shorter plan duration if the participant is experiencing higher risk, until their condition stabilises.

Note: all new plans created after 3 October 2024 will be 12 months.

Planning conversation for complex needs

The Complex Support Needs (CSN) branch works with participants with specific and unique needs. The CSN branch supports participants who need a higher support level to use their plan and pursue their goals.

To learn more, go to article Submit a referral to the Complex Support Needs (CSN) Branch.

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Planning

Knowledge Article

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General planning principles to safeguard the participant's interests

Reasonable and necessary supports

Reasonable and necessary supports are the supports included in the participant's plan to meet their disability support needs. These supports are in the budget areas of core, capacity building and capital.

NDIS laws determine what we can and can't fund. You must think about if supports are NDIS supports for the participant. To learn more about what is and isn't an NDIS support, go to What does the NDIS fund? (external).

A support won't be funded under the NDIS if it is likely to cause harm to the participant or be a risk to others.

To learn more, go to Our Guideline – Reasonable and necessary supports (external).

Planning guidance for specialist areas

You need to refer to guidance for participants with certain disabilities, in specific cohorts or with specialist needs. For example, there's specific guidance for participants with motor neurone disease to have supports in place for a quick response to a rapidly declining function as a safeguard for the participant.

Stated supports

A stated support makes sure the funds are used for a vital service and can't be used flexibly for an alternate support. An example of a stated support is support coordination. To learn more, go to article Support Categories.

Core supports

Core supports help the participant manage daily living areas such as self-care, community access, and consumable items such as daily adaptive equipment and transport. The appropriate funding level is included in the plan to make sure needs are met and the participant is safeguarded from risks. To learn more, go to article Support Categories.

Core flexibility

Core support flexibility in the participant's plan assists them to vary levels of control over how they use their support and responds to their changing needs. The flexible support will help reduce the likelihood of risks that may come up during the plan duration. To learn more, go to article Support Categories.

Low cost assistive technology

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For more information on assistive technology (AT), go to section **Capital supports** in this article.

Low cost AT is less than $1,500 in value and is generally low risk. These funds can be included to allow the participant to purchase low cost items. For example, a walking stick or basic shower chair. Funds can also be for minor AT repairs or to help the participant to decide which AT to purchase. This gives the participant immediate access and flexibility to purchase AT. This also minimises the risks from waiting for an assessment or purchase approval.

To learn more, go to:

- Our Guideline – Assistive Technology (external)
- article Support Categories.

Capacity building supports

Capacity building supports link to the participant's goals and aspirations. Funding is allocated to the specific support areas needed by the participant in their daily life.

Including NDIS supports in the plan to build capacity for independence or to build skills in an identified area can be in response to a risk, and therefore a safeguard.

To learn more, go to article Support Categories.

Support coordination

Plan developers consider the support level the participant needs to build their capacity to connect with supports and services. This includes informal and mainstream supports. Support coordination helps the participant to understand their plan and how to:

- use NDIS supports
- build capacity
- strengthen their ability to pursue their goals.

If multiple mainstream interfaces are involved, or there's a high-risk level, then specialist support coordination may be included in the plan.

To learn more, go to articles:

- Record support coordination information
- Understand support coordination and psychosocial recovery coach funding.

Psychosocial recovery coach (recovery coach)

Participants with a primary psychosocial disability can have support from a recovery coach. A recovery coach is a qualified mental health worker. From their own experiences and training,

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they understand the impacts of mental health. They can support the participant to build confidence and motivation to achieve their goals and use their supports to live a fulfilling life. A recovery coach will also support the participant to understand how the NDIS works with other supports including mainstream and community supports.

To learn more, go to articles:

- Understand psychosocial disability
- Understand support coordination and psychosocial recovery coach funding.

Specialist behaviour support

Some participants may need positive behaviour support to address behaviours of concern that are a risk to themselves or to others. These supports are recommended to:

- support the participant's safety and wellbeing
- promote options for increasing the participant's capacity and community and mainstream connections to pursue plan goals
- provide long term sustainability of the participant's plan and informal support systems.

Including specialist behaviour support in the plan to identify and reduce behaviours of concern can improve the participant's quality of life, uphold their dignity and safeguard their rights. As a further participant safeguard, positive behaviour support must be provided in accordance with the NDIS Quality and Safeguards Commission's requirements. This means these support providers must be registered with the Commission. This makes sure that restrictive practices are regulated.

To learn more, go to Our Guideline – Behaviour support (external).

Capital supports

Capital supports include AT, repairs and AT maintenance, vehicle modifications and home modifications (HM). The following AT processes make sure the participant's interests and risks to them are looked at to minimise delay in vital equipment needs.

Higher cost assistive technology and home modifications

There's a higher risk of injury, hospitalisation or even death if appropriate assessment, setup or construction isn't done for higher cost or complex AT.

Specialised and complex AT requires an assessment and supporting evidence from a qualified AT assessor. To learn more, go to article Understand high-cost assistive technology (AT) funding.

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Home modifications will require assessment, usually by an occupational therapist. In more complex cases a building professional is also involved. To learn more, go to article Support categories or Our Guideline – Home modifications (external).

Replacement assistive technology

Replacement AT involves a streamlined process to avoid delays and provide a like-for-like equipment replacement. This needs to follow specific criteria to make sure there are no unreasonable risks to the participant.

Rental or hire of assistive technology

Funding for rental of AT may be included in a participant's plan, for example if there's a supply delay, or if AT requirements are still being decided. This will usually be for a specific time period. This will make sure there's no risk to the participant's safety while the AT is obtained. To learn more, go to article Support Categories.

Assistive technology during the course of the plan period

AT supports are included in the plan based on the available information at that point in time. If we get an AT assessment recommendation during the plan period, the delegate must determine if:

- there are any risks to the participant in delaying access to the AT supports
- the recommended AT is reasonable and necessary.

A planner delegate must consider if the AT needs to be funded immediately to mitigate risks, or it can be funded at the next plan change.

To learn more, go to Our Guideline – Assistive Technology (external).

Plan management

Plan management is how the support budget is managed by the participant or their representative. The participant's funds can be managed in three ways:

- self-managed
- using a registered plan manager
- Agency-managed.

The participant can also use a combination of all three plan management options.

In the applying, planning and implementation stages, the benefits and responsibilities of each plan management option are discussed with the participant.

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For self-management or when the participant is using a registered plan manager, we need to decide if this approach is an unreasonable participant risk. There are things we must and must not consider when we make this decision. We will only decide a risk is unreasonable if there are no suitable safeguards, strategies or supports we can include in the participant's plan to manage the risk.

To learn more about the things we must and must not consider, go to Our Guideline – Creating your plan (external).

Next steps

Related knowledge articles:

- Record risks and vulnerabilities during a check-in
- Identify risks and vulnerabilities
- Create and complete a participant risk assessment case.

Related external guidance:

- NDIS Safeguards (external)
- Our Guideline – Your plan (external)
- Guide to self-management (external)
- Providing assistive technology (external)
- Understand assistive technology evidence, advice, assessments and quotes (external).

Article labels

PACE user role names

No change.

Topics

No change.

Case names

No change.

Ownership

No change.

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Version control

Version	Amended by	Brief Description of Change	Status	Date
7.0	GCP654	Class 1 approval Link to Guide – Psychosocial disability updated to Understand psychosocial disability.	APPROVED	2025-11-22
8.0	TDL262	Class 1 approval Update to align with PEC age range system change Linked article name change EL2 Review/approval to submit	APPROVED	2026-03-24

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SGP Knowledge Article Template

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Guide – Conversation style guide

This article provides guidance for an **access delegate, bereavement officer, business support officer**, **complaints officer**, **compensation delegate**, **early childhood partner**, **enrolment officer**, **external review officer**, **home and living delegate**, **internal review delegate**, **liaison officers**, **local area coordinator**, **national reassessment delegate**, **National Contact Centre**, **participant critical incidents officer**, **participant support officer**, **payment officer**, **planner delegate** and **planner (non-partnered area)** to understand:

- the purpose of the conversation style guide
- our engagement principles
- your role
- using your skills and knowledge
- your service commitment
- steps to take before the conversation
- how to prepare for the conversation.

Recent updates

October 2023

This guidance comes from the Conversation Style Guide. We've made minor updates to change any NDIS Business System language to PACE language. We'll make improvements to this guidance in the future.

Purpose of the conversation style guide

Your conversations with people with disability, and the people who support them are essential in delivering a positive experience with the National Disability Insurance Agency (NDIA). You will do this through collaborative conversations that are person-centred and lead to a mutual understanding. This conversation style guide will assist you to have an authentic and engaging conversation with people who contact us. It will also provide advice about the types of questions to ask and how to ask them.

We've included prompts to guide you through questions you might ask when having your conversation. We've included guidance to support some specific access and planning conversations.

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This conversation style guide doesn't contain scripts because you'll use your own words to engage and build rapport with the person you are speaking with. You'll use your communication skills, knowledge of the person, their life, current circumstances and needs to help you make evidence-informed decisions.

Our engagement principles

People with disability, their families and carers have told us they want us to engage and communicate with them by:

- giving the right information at the right time
- keeping it simple and consistent – plain English, language that they recognise and understand
- tailoring communications to their individual circumstances
- reducing confusion – giving a single source of truth
- empowering them to engage in the way that suits them
- making it real and relatable.

That's why we introduced the Participant Service Charter and our five engagement principles to explain what people can expect when they deal with us. These principles will guide every interaction you have with people who contact us. You can learn more about our Engagement Principles by completing the Understanding the Participant Service Charter and PSG LEAP eLearning module or by viewing the Service Charter behaviours on the intranet.

Your role

Your role in conversations with the person is to:

- get the right information about the person's life and current circumstances so we can provide a service that is **responsive** to their needs
- for access staff - make a high-quality, evidence informed decision about whether a person meets eligibility requirements
- for planning staff - make a high-quality, evidence informed decision about a participant's plan
- communicate any decisions about the person's eligibility or their plan, in a **respectful** and **transparent** manner
- provide information and support which helps the person stay **connected** to the NDIS and other services they need

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- deliver a quality person-centred experience that is **empowering** for people with disability and the people who support them
- uphold the NDIA values and Participant Service Charter.

Your skills and knowledge

You'll use your skills and knowledge to have a quality, person-centred conversation and make sure the person feels **listened to, respected and empowered** at the end of the conversation. Your conversations will reflect your positive, contemporary attitude towards people with disability, and your knowledge of the impact of disability on their lives.

The key skills you'll use to do this are:

- person-centred customer service
- empathy
- communicating clearly and using language the person understands
- active listening
- guiding the conversation
- interpreting information
- using your knowledge of disability to plan and have conversations
- responding to the person's needs
- identifying the person's strengths
- efficient information gathering
- having sensitive conversations.

Your service commitment

Our commitment to **putting the person at the centre of everything we do** guides our conversations. You represent the NDIS in your conversations with people with disability, and the people who support them. You'll make sure all your conversations leave people feeling **listened to, respected and empowered** by:

- providing people with disability, and the people who support them, access to personalised, high quality and innovative person-centred service
- welcoming, respecting and being inclusive of diverse cultures, perspectives and life experiences
- respecting and protecting the privacy and dignity of people with disability

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- giving people choices about how they want to communicate and ensuring accessibility
- giving people choices about how much support and assistance they want
- communicating with empathy and understanding
- responding to initial reports of critical incidents
- considering if the person requires support from the Complex Support Needs Branch, Exceptionally Complex Support Needs Program or services available outside of the NDIS.
- making timely referrals to Local Area Coordinators, Early Childhood Partners and other community supports
- accurately recording factual and unbiased information and outcomes in business system interactions as required
- making sure our information and decisions are easy to understand
- responding to individual needs and circumstances
- recognising the individual experience of people with disability and acknowledging they are the expert in their own life.

Before the conversation

Understand the person-centred approach

A person-centred approach is a way of thinking about the access or planning process. The approach supports you to **place the person at the centre of every conversation**, and thoughtfully consider their unique life circumstances including:

- disability type
- accessibility and communication preferences
- connections to family, friends, community, and culture.

Taking a **person-centred approach** will ensure your conversations reflect the Participant Service Charter, our engagement principles and NDIA Values.

The following sections will help you understand what a **person-centred conversation** is like at the NDIA.

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Understand the person's story and get to know who they are

You may not have spoken to the person before, so you should take time to understand who they are. You can do this by thoughtfully reviewing any assessments, reports, or interactions you have about the person.

Review available information before a conversation, so the person, or people who support them, do not have to repeat information they have already told us. When people have to retell their stories or repeat information they have already told us, this can cause stress and frustration. It is important to remember that the people who contact us may have:

- experienced trauma
- previously had negative experiences, or no experiences with government services
- had little say about, or control over the services and supports they received.

While reviewing information can help you prepare for the conversation, it is important to remember that the person is the expert in their life. Use your skills and knowledge when reviewing information about a person. Any decisions or recommendations you make will be based on a wide range of evidence and information.

The best source of information about a person's story and unique circumstances is the person themselves or the people who support them.

You have an opportunity to provide an **empowering** and **respectful** experience by taking the time and care to understand a person's story as much as possible.

Support the person's accessibility and communication preferences

Communication is a basic human right. Some people may find it difficult to communicate with spoken word. This doesn't mean they don't have something to say.

Some people may also have sensory and accessibility needs that you will need to consider during the conversation. For example:

- background noises or lighting may impact the conversation
- they may use communication aids or systems such as communication boards
- they may use support animals if they experience blindness, vision impairment or psychosocial disability
- they may use interpreters if they are Deaf, hearing impaired or culturally and linguistically diverse.

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You'll use your knowledge and skills to understand how to engage with people with disability, and the people who support them, depending on their communication and accessibility preferences. This approach will support all your conversations.

Resources like the disability snapshots and the disability navigator can help you to build your confidence and tailor your conversations to the person's accessibility and communication needs.

Make the conversation environment safe and comfortable

This will help lower any stress the person may be feeling and will make it less likely for the person to feel overwhelmed. Finding out the person's accessibility and communication preference is the first step in creating a safe environment for the conversation. You should collaborate with the person to choose a suitable time, date, and place for the conversation.

It is important to create an emotionally safe environment. An emotionally safe environment helps the person feel calm and supported. This is very important for people who have experienced trauma. You can create an emotionally safe environment by:

- being alert to the possible signs of stress
- responding to the person in a supportive way.

If a person is stressed they may:

- have dilated pupils
- experience changes in skin colour
- take long pauses when speaking
- speak quickly
- fidget with their clothing or any items nearby.

You can support a person who is stressed by:

- reassuring them that they can take their time
- encouraging them to take short breaks throughout the conversation
- using non-verbal cues that show you are supportive, focused and listening in a way that responds to their needs and emotions.

To learn more about creating a safe environment for phone and web-based conversations, refer to article Guide – Conversation style guide appendix B – Navigating different types of conversations.

Prompts to create an emotionally safe environment

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- Please take your time, I am here to listen and help when you are ready.
- Would it help if we took a short break?
- I just want to check in and ask how you are feeling. Is there anything you need before we continue our conversation?
- I can see this might be hard for you. Having a conversation about the support you need can be tough. Let's take our time and work through this together.

To learn more about conversation techniques, refer to article Guide – Conversation style guide appendix A – During the conversation.

Work with the people who help the person make decisions

The person at the centre of the conversation may have a support person, family member, nominee, or guardian with them to help them make decisions or feel more comfortable. You'll make sure you include these people in the conversation, if the person with disability wants to do so.

Always try to speak to the person directly if there are other people who are part of the conversation.

Use the person's name to bring the focus back to them and make sure you acknowledge the person's wishes, thoughts, and insights, even if they do not communicate verbally.

If the person is a child, make sure you choose a time and location that suits the family's needs and always speak to the parent or guardian if there is someone else like an advocate who is part of the conversation.

If the person has asked not to be contacted directly, it's ok to speak to someone on their behalf.

Prompts to keep the person at the centre of the conversation

- Can I check that with you John?
- John, your doctor stated you use a Four Wheel Walker, is that right?
- John, is that how you feel about the support you get at work?
- John, is there anything else you would like to add?

Prepare for the conversation

Preparing for a conversation is as important as the conversation itself. Before you have a conversation about a person's NDIS application or plan make sure you have:

- read and understood any guidance about the conversation

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- familiarised yourself with any information that has been provided to the NDIA by the person with disability or the people who support them
- an understanding of what the person you are communicating with needs to meaningfully participate in the conversation.

You'll need to be well informed and open-minded while you consider access or planning decisions. You won't come to a final decision until you are sure you have all the information you need to understand the person's circumstances and needs.

Allow enough time for the conversation, don't rush. Make sure you allow time for the person, and anyone supporting them, to build rapport, talk with you, ask questions and seek information as required. Make sure you also allow some time for them to open up about broader concerns if they need to.

To learn more about having conversations, refer to articles:

Guide – Conversation style guide appendix A – During the conversation

Guide – Conversation style guide appendix B – Navigating different types of conversations

Article topics and case names – internal use only

Topics

This article relates to the following topics:

- t_communication

Case names

You can use this guidance for the:

- dc_case_accessrequest
- dc_case_checkin
- dc_case_communityconnections
- dc_case_earlysupports
- dc_case_eligibilityreassessment
- dc_case_enquiry
- dc_case_evidenceextension
- dc_case_feedbackandcomplaints

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- dc_case_functionalcapacityassessment
- dc_case_hospitaldischarge
- dc_case_housingapplication
- dc_case_internalreview
- dc_case_leavingthendis
- dc_case_manageauthorisedrepresentative
- dc_case_participantbudgetupdate
- dc_case_participantcriticalincident
- dc_case_participantriskassessment
- dc_case_personalandenvironmentalcircumstances
- dc_case_planapproval
- dc_case_planchange
- dc_case_planimplementation
- dc_case_requestforservice
- dc_case_requestforaction
- dc_case_updatebankaccount
- dc_case_updatepersonaccount
- dc_case_updateprofile

Version control

Version	Amended by	Brief Description of Change	Status	Date
0.1	BTM847	Transferred content from Conversation Style Guide to KA template and renamed Guide – Conversation Style Guide. 2 Appendices to be included to support this guide.	DRAFT	2023-10-05
0.2	MSM312	Peer review	DRAFT	2023-10-06

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Version	Amended by	Brief Description of Change	Status	Date
0.3	BTM847	Action peer review Sent for VT VT results: Long sentences 14.93% Passive voice 3.17% Readability 42/100 Grade level 9.8	DRAFT	2023-10-06
0.4	EJW711	EL1 review	DRAFT	2023-10-09
0.5	BTM847	Action EL1 review	DRAFT	2023-10-09
1.0	JS0082	Class 1 Approval	APPROVED	2023-10-10

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Guide – Conversation style guide appendix A – During the conversation

This article provides guidance for an **access delegate, bereavement officer, business support officer, complaints officer, compensation delegate, early childhood partner, enrolment officer, external review officer, home and living delegate, internal review delegate, liaison officers, local area coordinator, national reassessment delegate, National Contact Centre, participant critical incidents officer, participant support officer, payment officer, planner delegate** and **planner (non-partnered area)** to:

- understand techniques to use during the conversation.

Recent updates

October 2023

This guidance comes from the Conversation Style Guide. We've made minor updates to change any NDIS Business System language to PACE language. We'll make improvements to this guidance in the future.

Before you start

You have read and understood:

- article Guide – Conversation style guide.

During the conversation

Set up a collaborative conversation

It's important to recognise the way you structure and conduct a conversation contributes to a person feeling **listened to, respected and empowered**.

That is why you will work collaboratively with the person to establish some structure for the conversation.

You will spend a few minutes at the start of the conversation discussing the reason you and the person are speaking. This will help you both reach a mutual understanding about the purpose of the conversation and make the best use of your time together. This does not need to be written down or completed formally.

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You can set up a collaborative conversation by:

- introducing yourself by name to the person
- explaining your role with the NDIA and how you may be able to help
- explaining the purpose of the conversation, including:
  - why you are having the conversation
  - what you need from the person you are speaking to
  - how long you think the conversation will take
  - giving an opportunity for the person to identify anything they would like to discuss
  - reaching an understanding of the outcome you are both seeking.

Prompts to support a collaborative conversation

- Today I need to find out a bit more about you so I can make the best decision about your request/plan, is there anything you would like to talk about in this conversation?
- We may not have time to discuss that today. I can show you where to find more information at the end of this conversation if that would help?
- If we are getting off track, how would you like me to remind you of the structure we set for our conversation?

Before you continue the conversation ensure the person you are speaking with:

- understands the structure you have set together
- has the support they need to participate in the conversation
- is happy to proceed with the conversation.

You will do this for all conversations, whether by phone, face-to-face or through another channel such as web-based.

To learn more about phone and web-based conversations, refer to article Guide – Conversation style guide appendix B – Navigating different types of conversations.

Prompts to check the person's understanding and comfort

- It sounds like the purpose of our conversation today is … does that should right to you?
- Based on what we have discussed, are you happy to continue our conversation?
- Is there anything else you need to feel supported during this conversation?

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SGP Knowledge Article Template

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Always explore safeguarding

A general principle which guides our actions under the NDIS Act, is the support of people with disability to exercise choice. This includes respecting the rights of people to take reasonable risks when making choices about how they want to live their life. Your conversation with the person provides an opportunity for open discussion to identify any actual and potential risks.

You can use the conversation to encourage the person to develop their own strategies and safeguards to reduce their potential exposure to harm. This will help you decide if you also need to put additional safeguards in place.

For more information, refer to article Guide – Safeguarding the participant's interests.

For participants: The Participant Critical Incidents Framework helps you know what to do if you suspect or obtain information that a participant may be:

- subject to physical, emotional or financial abuse, neglect or exploitation
- at risk of suicide or self-harm
- at risk of harming others.

Refer to the Participant Critical Incidents page on the intranet for more information.

For other people: You will immediately alert your line manager if you suspect or obtain information that a person may be:

- subject to physical, emotional or financial abuse, neglect or exploitation
- at risk of suicide or self-harm
- at risk of harming others.

If a person is at immediate risk of harm you should:

- call 000 to contact the appropriate emergency service
- alert your line manager as soon as possible.

Prompts to explore the persons safeguards

- Can you tell me about a typical day for you?
- Who helps you if things go wrong or you need to talk to someone?
- What sort of things do you enjoy doing?
- Who do you like spending time with?
- What do you think about when choosing a provider?
- Who would you speak to if you think a provider or support person isn't treating you fairly?

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- Refer to the Responding to Suicide and Self-Harm Fact Sheet for more information.

Safeguarding conversations can be emotionally tough. There are techniques in article Guide – Conversation style guide appendix B – Navigating different types of conversations to help you talk about safeguarding with people who contact us.

Set the tone

You have the same voice all the time, but your tone changes. The tone you use at the start of the conversation will influence whether the person feels that you are listening to them. It will get the conversation off to a good start and show that you are interested in their circumstances and concerns. Adjust the rhythm and volume of your voice depending on the person's ability to hear you clearly and their level of understanding. You will also change your tone depending on the emotional state of the person you are talking to. For example, you would use a different tone of voice to talk to a person who is nervous or upset than you would with someone who is more relaxed.

Build rapport

The mirroring technique builds a connection and rapport with the person. Where appropriate, use some of the same words (keywords) or phrases as the person you speak to. Mirroring can give the person the feeling they are talking with someone familiar and so the conversation is easier and more comfortable. Don't try to copy the person as this will not be your usual style and may come across as false or unapproachable. Remember a person's outward gestures may not always mean what you think they do, so use your judgement when you think mirroring is useful.

Tips for rapport building

- Mirror a person's tone of voice, rate of speech and word choice
- Use friendly, neutral and respectful communication to show and guide the participant to mirror your communication
- Listen and use the participant's keywords in conversation and in your questions
- Note down keywords.

Actively listen

Active and effective listening is a very important communication technique that requires you to provide verbal and non-verbal feedback to people. It shows them you are listening and understanding. You need to fully concentrate on the person and understand and respond to their needs, not just hear what they are saying. At times a conversation may include a third

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party, interpreter or National Relay Officer so your strong active listening skills will be valuable here.

Active listening requires you to listen with all your senses. Convey your interest and your focus on the person by:

- using both verbal and non-verbal messages such as maintaining eye contact if this is possible for the person, nodding your head and smiling
- allowing the person to finish everything they are saying before you respond
- encouraging the person to continue
- use paraphrasing to make sure you understand what the person has said.

When you provide this feedback and level of interest, the person will usually start to feel more at ease and therefore communicate more easily, openly and honestly.

Prompts to check your understanding

- So from what you are saying John can only access public transport with your assistance?
- Just to check I am hearing you correctly, it sounds like you support John to manage his finances?
- Just so I am sure I have understood you correctly, I am hearing you would like to self-manage your plan. Is that correct?

It may take some time for the person to tell you about their circumstances and needs. Take time to build trust. During the conversation, if you remain silent the person may feel like they are not being understood or that you are not listening to them.

Don’t make assumptions – listen to what is being said and consider all information available to you.

We can gently encourage the person to use active listening, too. The person may have spent a lot of time preparing for the conversation with you. They may want to give you lots of information about their life, their progress and what they think about their interactions with us. You may need to encourage the person to slow down and listen to your questions or your explanations. You could lower your voice and speak more slowly and quietly to encourage them to listen intently to hear you. You can also gently and respectfully remind them of the structure you set at the start of the conversation to help bring their focus back.

An authentic, two-way conversation relies on both of you listening, understanding and being open and honest.

Prompts to check for mutual understanding

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- Before we move onto the next question, I am going to repeat what you have told me to make sure I have heard you properly.
- Let's pause here and go over what we have spoken about.
- Can I check that I have explained that properly? Can you tell me what you think the next steps are?

Checking you understand what the person has said demonstrates active listening. It isn't just about showing you are actively listening or checking facts; you can also use it to help the person think through what they are saying or reporting they are doing. This is also a useful way of owning a misunderstanding, and not making the person feel frustrated because they can't get their point across.

More prompts to check your understanding

- I think I've confused things, did you say…?
- I think I've got this wrong, did you just say…?

Ask effective questions

Using the right questions at the right time in the conversation will allow you to have a genuine conversation with the person. It will build rapport and direct the conversation to cover the things you need to discuss.

Open questions connect you and the person together as you gather information. Asking open questions gives the person an opportunity to give you a longer full answer and draw on their lived experience and feelings. Open questions also give you more time to understand the person's current circumstances and needs.

Open question prompts

- What does a normal day look like for you?
- What do you enjoy doing?
- How have you been getting on with your support worker?
- How do you get to your appointments?
- What would you like to do more of?
- What type of assistance do you need to cook meals?

Closed questions can be useful when you need a specific response or a simple "yes" or "no". You may choose to use closed questions to bring a discussion topic to a close. Closed questions also help to find out a specific piece of information so that you can find something in the person's record.

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Closed question prompts

- Does your support worker visit your home every day?
- How often do you catch up with your friend Jane?
- Do you always need someone to help you to prepare your meals?
- How often do you go to work at the coffee shop?
- How long has John lived at Shipton Grove?

Probing questions are another way to find out more details. Probing questions will help you to get clarification, ensure you have the whole story and that you understand it thoroughly. They can draw detailed information from the person if they are unsure or uncertain about the conversation.

Probing question prompts

- To help me understand, can you please give me an example of how you support John to access the community?
- Can you tell me a bit more about how you use your 4 wheel walker at home?
- I heard you say that spending more time outdoors is important to you, could you tell me a bit more about what that would look like?

Leading questions help you manage the conversation to resolution, in a way that allows the person to make choices and have control over the outcome. Leading questions might help you if you need to manage the conversation to move on from a particular topic. Leading questions also help if you need to test how the person feels about a particular idea. You can use assumptions in your questions to introduce information and suggest alternative approaches or processes to the person. Leading questions also give you the opportunity to give the person a choice between options.

Leading question prompts

- Shall we go ahead and look at the steps for starting to self-manage your plan?
- Let's discuss the information we need from your occupational therapist. I can provide some examples. Would that be helpful?
- I can walk through the next steps with you now, over the phone. Or, I can help you find where the information you need is on the NDIS website so you can look over it late?

To learn more about having conversations, refer to articles:

Guide – Conversation style guide

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Guide – Conversation style guide appendix B – Navigating different types of conversations

Article topics and case names – internal use only

Topics

This article relates to the following topics:

- t_communication

Case names

You can use this guidance for the:

- dc_case_accessrequest
- dc_case_checkin
- dc_case_communityconnections
- dc_case_earlysupports
- dc_case_eligibilityreassessment
- dc_case_enquiry
- dc_case_evidenceextension
- dc_case_feedbackandcomplaints
- dc_case_functionalcapacityassessment
- dc_case_hospitaldischarge
- dc_case_housingapplication
- dc_case_internalreview
- dc_case_leavingthendis
- dc_case_manageauthorisedrepresentative
- dc_case_participantbudgetupdate
- dc_case_participantcriticalincident
- dc_case_participantriskassessment
- dc_case_personalandenvironmentalcircumstances
- dc_case_planapproval
- dc_case_planchange
- dc_case_planimplementation

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- dc_case_requestforservice
- dc_case_requestforaction
- dc_case_updatebankaccount
- dc_case_updatepersonaccount
- dc_case_updateprofile

Version control

Version	Amended by	Brief Description of Change	Status	Date
0.1	BTM847	Transferred content from Conversation Style Guide to KA template and renamed Guide – Conversation Style Guide. Parent guide and additional appendix to be included to support this appendix.	DRAFT	2023-10-05
0.2	AMK633	Peer review	DRAFT	2023-10-06
0.3	BTM847	Action peer review Sent for VT VT results: Long sentences 18.92% Passive voice 2.25% Readability 57/100 Grade level 7.7	DRAFT	2023-10-06
0.4	EJW711	EL1 review	DRAFT	2023-10-09
0.5	BTM847	Action EL1 review	DRAFT	2023-10-09
1.0	JS0082	Class 1 Approval	APPROVED	2023-10-10

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Guide – Conversation style guide appendix B

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

- navigate different types of conversations.

Recent updates

22 September 2025

Guidance updated to inform staff members not to enter participant information into AI tools.

Before you start

You have read and understood:

- article Guide – Conversation style guide
- article Guide – Conversation style guide appendix A.

Navigate different types of conversations

Phone and web-based conversations

You'll need to prepare differently and use different skills for phone and web-based conversations. The person may prefer a phone conversation because it's more convenient and they won't need to travel. You'll need to put as much effort into preparing for a phone conversation as you would for face to face.

Some tips for effective phone conversations are:

- find a quiet place where you won't be disturbed when you make the call
- minimise background noise and distractions
- open the conversation with a smile and with energy in your voice
- use the person's name when you greet them
- speak clearly and be succinct

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- make sure the person can hear you well and they're in an appropriate place to have the conversation
- if you're meeting with the person and their support person on the phone, encourage them to use speakerphone so everyone is involved
- ask the people supporting the person to explain questions and provide unfiltered responses from the person
- use an appropriate pace and tone of voice. Don't speak too fast or too slow
- be aware of anything that may make it harder for the person to understand you on the phone
- don't do other things at the same time. The person will be able to tell if you're distracted
- actively listen and give the person your full attention.

Phone and web-based conversations have challenges. You and the other person can't see each other's body language or make eye contact to build rapport and understanding. If a person speaks for a long period of time, it may be uncomfortable to hear silence on the other end of the phone. To address this, use the verbal nods below to replace the signals you would use when face to face.

Verbal nods

- I understand
- I see
- Yes
- Okay.

Goal conversations

Why do we talk about goals?

Goals tell us how the person wants their future to look. When you talk with a person about their goals, it helps you get to know them and the things that are important in their life.

The person you're supporting may like your help to set their goals. If you're developing a plan with them, you'll record their goals in their own words. Don't change the wording of their goals. Using their words shows that we listen and respect their right to choice and control. When the person's goals are in their own words they're more likely to feel empowered and engaged in pursuing their goals.

Setting goals (external) on the NDIS website is an important resource that:

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- explains what goals are and why they're important
- helps the person identify and record goals
- outlines what supports will help them pursue their goals.

Use this resource to help you to have a conversation that supports the person to develop goals and understand how this relates to their plan – if they have one.

If you're supporting a participant who will get funded supports, explain that informal, community, mainstream and NDIS funded supports can all support them to pursue their goals. Support the participant to develop goals that reflect what they want to pursue rather than to justify a particular amount of funding in the plan.

Go to Setting goals (external) for examples of how:

- to record steps to work towards goals
- mainstream, community and informal supports help the participant pursue their goals.

What will the goals conversation look like?

Your conversation about goals will foster positivity and take a strengths-based approach. Using a strengths-based approach means you will focus on the person's talents, strengths and potential. This will help them think about their goals and the steps they can take to pursue them.

For examples of strengths-based questions to help the participant identify their goals, go to Setting goals (external).

It's important to revisit goals during every conversation, especially at check-in and plan reassessment conversations. You'll need to understand what the participant is trying to pursue with their goals. This includes having a clear picture of their story including their life circumstances, future goals and existing supports, including informal and mainstream supports.

Talk about if anything needs to change in their next plan to support them to keep pursuing their goals.

Sensitive conversations

Some people with disability, or their families and carers, may be stressed, anxious or upset when they come to the conversation. They may have had a poor experience in a previous interaction with us or another government agency. They could also have a complaint about a decision we've made. You'll need to manage emotions and sensitive information in a

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professional and calm way to get the conversation back on track and work through the problem with the person.

You may need to start a conversation that you know is likely to be sensitive. For example, when contacting a person who has applied to the NDIS to tell them they aren't eligible. Or, to tell a participant that a support can't be funded.

Active listening is one of the most important skills you can use in these situations. Instead of saying things like "I understand, but" use active listening to say "So what you're telling me is …… and we need to work out how to…"

These tips can help you manage sensitive conversations and make sure the person has a respectful experience with us:

- Go into the conversation with a positive mindset and think about how you can work with the person to get a good outcome. Use a strengths-based approach.
- Do your research and understand what has happened to the person in the past and if they might be anxious, upset or angry. Plan what you want to say, but don't script. You're aiming for the conversation to flow naturally.
- Ask yourself what you think the problem is, then ask yourself what the person thinks the problem is. It may not always be the same thing and this will help you to steer through to a resolution.
- Use empathy and take time to notice the person's words and tone.
- Slow the pace of the conversation and use your tone of voice to diffuse tension. You might need to use different techniques to make yourself heard, for example say "if I can just get you to hold on so I can respond to that…"
- Make sure your actions reflect your words. For example, don't say "I hear you" while you are making notes and not paying attention to the person.
- Debrief with a colleague or your team leader after the conversation if you need to. It's important to take factual and objective notes as a record of the conversation. Don't use emotive language in your notes or make judgements.
- Use reflective practice to discuss how the call went with your manager or team. This will help you reflect on what went right or wrong and how you might approach the next call a little differently. Reflective practice helps you understand how to apply the techniques in this guide to a specific practice issue or type of conversation. For example, you might

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reflect on how you will empower a self-managed participant to take control of their spending decisions, or what it means to have a culturally safe conversation with an Aboriginal or Torres Strait Islander person.

- Be aware of policies and guidelines to help you manage unreasonable behaviour. Sometimes people might display unreasonable behaviour. This can be aggression, anger or offensive language. If this happens, it's important to remain respectful and empathetic while keeping yourself safe. To learn more about how to respond respectfully and confidently to unreasonable behaviour, go to Managing Unreasonable Behaviour Guideline (1002 KB).

Explaining your access or planning decisions

Use the information you gathered in your research about the person's circumstances and your conversation with them to make a decision. Explain your decision to the person and provide reasons. Use Our Guidelines (external) to make your decision and record the key information you used to come to your decision.

Speak with empathy if the person doesn't agree with your decision initially and take time to explain your reasons. The aim is to come to a decision you both agree with. You'll need to be open-minded and take the person's choices into account. Your aim is to make sure the person feels heard, respected and empowered at the end of the conversation. You and the person should agree on the best course of action.

It's critical that you explain your decisions well, so the person understands what it means for them and they have all the information they need. If the person doesn't understand the decision or their options moving forward, they may feel disempowered. The person may make a complaint or request a decision review.

People have a right to make a complaint or ask for a review if they think we made the wrong decision. However, you should use your skills and knowledge to understand and resolve a person's concerns, long before it becomes a formal complaint.

If you have tried to resolve the person's concerns and they are still unhappy, support them to:

- access information about How to give feedback (external) on the NDIS Website
- arrange a conversation with their my NDIS contact
- request an explanation of a decision
- request a review of a decision.

Prompts to help you explain your access decisions

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- Would you like me to explain the types of information we need about your disability when assessing your eligibility for the NDIS?
- Can I check the information I've given you about your therapist's report and why I think that means you're not eligible for the NDIS makes sense?
- Would you like me to explain anymore about what will happen when you connect with a Local Area Coordinator? Do you have any questions about that?

Prompts to help you explain your planning decisions

- Let's have a chat about why we couldn't fund that support and how we can help you get the support you need.
- I can book in a check-in to chat about how you are going with managing your NDIS funds. Would that be helpful?
- I'd like to arrange for you to have a reassessment or check-in meeting so we can discuss your supports now that your parents have moved house. Are you happy for us to arrange this now?

Ending the conversation

Before you end the conversation, think about whether the person feels listened to, respected and empowered.

Thank the person for their time and let them know what will happen next. If you are helping the person with their plan, make sure they have your contact details, or the contact details for their my NDIS contact. This is so they can make contact if they need to in the future.

Next steps may depend on the actions you and the person have agreed on. Make sure you let the person know what will happen next, how long it will take and what they need to do, if anything, to prepare for the next step.

Make sure you have confirmed the person's communication preferences. For example, do they want their letters or new plan sent to them in braille or large font?

Always check if there is anything else the person would like to discuss before you end the conversation. Listen to the response carefully, as the person may want to discuss concerns or may open up to you about something you have not discussed yet.

Always use the person's name when you end the conversation and acknowledge the contribution from the nominee, family members or carers who have been part of the conversation.

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Prompt to end the conversation respectfully

- Is there anything else I can do for you today?

After the conversation

Use the principle of 'no wrong door' and follow up the person's questions, feedback, or complaints with other areas in the NDIA, with partner organisations and with external stakeholders. Provide as much information as you can and provide a warm handover to others. Make sure you obtain consent from the person to share information if appropriate.

Record your conversation, agreed actions and details about any decisions you made in an internal note. To learn more, go to article Log an activity or internal note.

Note: using personal information in AI tools such as Copilot is a breach of privacy. Don't add any participant information into AI tools when you record your conversation.

To learn more about how to have conversations, use articles:

- Guide – Conversation style guide
- Guide – Conversation style guide appendix A.

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

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Knowledge Article

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1.0	JS0082	Class 1 Approval New Knowledge article	APPROVED	2023-10-10
2.0	AHB706	Class 1 Approval Guidance updated to let planners know not to put participant data into AI tools.	APPROVED	2025-09-12

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Knowledge Article

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Guide – Assisting communication – Disability-related interpreting and translation supports

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

- disability-related interpreting and translation supports.

Recent updates

2 September 2024

Guidance updated to:

- remove retired article Add or update disability-related interpreting and translation supports in a plan approval case
- change mention of National Access and Reassessment Branch to Scheme Eligibility Branch.

Before you start

You have read and understood:

- article Guide – Assisting communication
- article Guide – Assisting communication – Considerations when arranging interpreting services
- article Check a person's preferred contact method.

Disability-related interpreting and translation supports

All participants must be supported to communicate in their preferred method in all their dealings with the National Disability Insurance Agency (NDIA).

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Consider the level of support the participant may need in their everyday life. This may depend on factors like:

- access to family and social networks
- access to early intervention or education
- additional disabilities
- geographic location
- cultural background. This may influence the barriers for a person who is Deaf, Deafblind or hard of hearing.

Hearing-related interpreting and translation supports

The participant's level of hearing loss is just one factor to consider. Think about other factors to determine the level of support they may need in their everyday life.

Supports are funded through the participant's plan for those participants who are Deaf, Deafblind, have hearing loss or a hearing impairment. To learn more, go to Guide – Hearing Supports.

The participant has choice and control over who provides their preferred communication support (Auslan, tactile fingerspelling, hand-over-hand signing, or visual frame signing).

It's the responsibility of the NDIA, the local area coordinator or early childhood partner to book and pay for an interpreter, for any interactions they have with the participant.

When you organise a meeting or event, you must make sure it's accessible. If you need an interpreter, you need to book well in advance, particularly in remote parts of Australia.

There are a number of booking organisations that can arrange interpreting support for people with a hearing impairment. These can be state-based Deaf and hearing impairment societies or national organisations.

When you book an interpreter service, make sure the interpreter has a valid Working with Children Check. This is required even if the participant is over 18, because it means the interpreter has the appropriate clearances.

A specific interpreter can help maintain quality of support and benefit the participant throughout their National Disability Insurance Scheme (NDIS) experience. You must discuss the participant's preference with them when arranging an interpreter. **Note:** Disability-related interpreting and translation supports are funded separately to interpreting services required to support the participant to interact with the NDIA.

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Translation and interpreting services

Includes reasonable and necessary translation and interpreting supports to attend events and occasions like:

- medical or health professional appointments like general practitioner, nurse practitioner or medical specialist
- private legal and financial appointments
- special occasions like weddings or funerals
- volunteering opportunities
- support or interest groups
- sporting opportunities
- courses provided by private education providers who do not provide interpreters.

Check that the supports are not funded by mainstream services like:

- Health Care Interpreting Services (HCIS) at public hospitals.
- Employment Assistance Fund (EAF) for the workplace.
- Community Relations Commission (CRC) for the justice system.
- National Relay Service (NRS) to help a deaf, hard of hearing or person with speech impairment to make and receive phone calls.

The following is important information to note:

National Auslan Booking Service (NABS)

NABS isn't a free service for NDIS participants. If reasonable and necessary, interpreting services should be funded in the participant's plan. Participants have choice and control over who provides their preferred communication support.

National Relay Service (NRS)

NRS isn't funded as it's a free-of-charge phone service to help people who are deaf, hard of hearing or speech impaired. These services help to make and receive phone calls via a range of devices from computers, tablets, mobile phones, an ordinary phone or TTY (a special phone with a small keyboard and screen). The NRS doesn't provide on-demand face-to-face support for Auslan users to interact with government services.

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Remote captioning

Remote captioning can include:

Video Remote Interpreting (VRI)

VRI uses videoconferencing technology to provide a professionally accredited Auslan-English Interpreter via the internet. VRI allows a person to see and talk to an interpreter. They don't have to be in the same room, or even in the same city.

Live Captioning

Live captioning provides an instant, readable alternative to spoken English. Offsite captioners listen to what is being said. They transcribe the words and then send the text over the internet to the participant's screen within five seconds of it being said.

Deaf relay interpreting or specialist Deafblind interpreting

These supports are more than standard Auslan interpretation support. The participant will need two interpreters working together. It's similar to translating from one language into two consecutive languages.

Interpreter One: A Deaf or hearing interpreter will understand the context and meaning of the information from the source language to other visual and tactual communication forms and vice-versa.

Interpreter Two: Assists with the flow of communication so no information is lost. When requesting a second interpreter, specify the second interpreter needs to be either a Deaf language interpreter (relay for language other than English) or Deafblind.

Deafblind communication supports

Deafblind communication supports include:

- tactile fingerspelling
- hand-over-hand signing
- visual frame signing.

Deafblind communication guide

This guide provides visual-information support to help the participant communicate or participate in social and community activities. For more information, go to article Deafblind Disability Snapshot.

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Auslan Training

Auslan in the home is to provide children, adults and their family access to Auslan training in the home.

Determine reasonable and necessary supports and think about:

- the participant's primary mode of communication
- the participant's age. For example, a toddler has a shorter concentration span than older children or adults
- other family members with Auslan language skills or role models like a person using sign language
- local access to mainstream services for Auslan classes (this varies nationally)
- packages for Auslan training in the home. This will depend on the age of the participant and the intensity they require in terms of sign language development
- the level of support the participant currently receives, either through the NDIS or mainstream services. For example, through the Education system.

Specialised equipment

Specialised equipment includes:

- flashing light or vibrating baby cry alarms
- flashing light or vibrating doorbells
- flashing light or vibrating smoke alarms.

Hearing equipment, training, maintenance and batteries

For more information on hearing equipment, training, maintenance and batteries, go to article Guide – Hearing Supports.

Supports for parents

Early access to communication supports for children and family members is important to support:

- full integration in the family home which is integral to speech and language development

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- a positive sense of identity.

These supports can include:

- speech therapy for children
- Auslan training for family members of children with a hearing impairment.

Coordination of complex supports

Coordination of complex supports helps to:

- navigate mainstream systems
- arrange supports
- deal with major life transitions
- translate letters or bills.

Capacity building supports

Capacity building supports help with:

- social skills development
- independent living skills training
- mentoring support
- travel training.

Funding for disability-related interpreting and translation supports

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Non-disability interpreting and translation services for languages other than English can't be funded in the participant's plan. This is because it isn't directly related to the participant's disability. To learn more and for information on accessing Indigenous languages, go to article Guide – Assisting Communication – Non-disability related interpreting and translation.

National Accreditation Authority for Translators and Interpreters

National Accreditation Authority for Translators and Interpreters (NAATI) provides the certification needed to practice as an interpreter or translator in Australia.

Where available, you are encouraged to use NAATI recognised services. In some circumstances, it may not be possible to access NAATI recognised services, for example in regional and remote areas. Translating and Interpreting Services (TIS) provides interpreting services to support the NDIA to communicate with their non-English speaking participants. The TIS National policy is to recruit NAATI certified interpreters.

A certified interpreter facilitates accurate transfer of meaning between the two languages and considers any cultural sensitivities.

NAATI Interpreters are bound by the Australian Institute of Interpreters and Translators (AUSIT) professional code of conduct and ethics. This requires them to:

- interpret accurately and honestly without adding or omitting anything being said
- maintain confidentiality
- be impartial and objective
- act in a professional manner at all times.

Interpreters shouldn't:

- provide advice to the participant. For example, how to answer a question
- translate written documents.

Interpreters of new and emerging languages which aren't included in the certification system can receive recognition from NAATI.

To learn more, go to NAATI (external), TIS National (external) or AUSIT (external).

Next steps

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Knowledge Article

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For further information on:

- assisting communication, go to article - Guide – Assisting communication – Non-disability related interpreting and translation supports
- accessible formats, go to article Guide – Assisting communication – Accessible formats.

Article labels – internal use only

PACE user role names

No changes.

Topics

No changes.

Case names

No changes.

Ownership

No changes.

Version control

Version	Amended by	Brief Description of Change	Status	Date
2.1	SGH107	Update guidance to remove retired article.	DRAFT	2024-08-02
2.2	MSM312	Peer review	DRAFT	2024-08-02
2.3	SGH107	Action peer review feedback	DRAFT	2024-08-02
2.4	EJW711	EL1 review	DRAFT	2024-08-05
3.0	JS0082	Class 1 Approval	APPROVED	2024-08-06

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Knowledge Article

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		Update guidance to remove retired article.		

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Knowledge Article

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Guide – Assisting communication – Accessible formats

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

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

- accessible formats
- action needed in PACE to generate accessible correspondence.

Recent updates

31 March 2025

Guidance updated for staff to check if a person's preferred correspondence format is recorded correctly in PACE. This means they receive documents in a format accessible to them.

Before you start

You have read and understood articles:

- Guide – Assisting communication
- Guide – Assisting communication – Disability-related interpreting and translation supports
- Check a person's preferred contact method.

Accessible formats

The National Disability Insurance Agency (NDIA) has an arrangement with an external provider to convert NDIS plans and other documentation into accessible formats, including braille. Before you generate correspondence in PACE you **must** check the person's Standard Correspondence and Plan Correspondence preferences are correct. A **person** could be an applicant, participant or authorised representative. To do this, go to the Person Account and check the information in the Details tab. If you need to update these details, use article Update a Person Account.

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When you generate correspondence in PACE it will automatically request the accessible format with the external provider. This will only happen if standard and plan correspondence preferences are up to date.

The NDIA is responsible for providing a copy of the following documents in the person's chosen accessible format:

- the participant's plan
- other PACE generated correspondence.

The following lists tell us which alternative accessible format options are available in PACE. Use this when you talk to the participant about their preferences.

Large Print letter

The available options are:

- large font sizes - 18, 20, 22, 24, 26, 28 and 36.

Braille letter

The available options are:

- double sided grade 1 letter
- double sided grade 2 letter
- single sided grade 1 letter
- single sided grade 2 letter
- e-braille (CD)
- e-braille (USB).

Note: in PACE you must select Braille for both the language and format.

Audio

The available options are:

- MP3 (CD)
- MP3 (USB)

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- CDA (CD)
- CDA (USB)
- DAISY Audio (CD)
- DAISY Audio (USB).

Electronic text via the portal

The available options are:

- MS Word
- PDF.

Printed text

The available options are:

- Standard Print.

Special format text

The available options are:

- e-pub (CD)
- e-pub (USB)
- DAISY Text (CD)
- DAISY Text (USB)
- Open Office (CD)
- Open Office (USB)
- Rich Text (CD)
- Rich Text (USB).

We will provide all correspondence, including a participant's plan in their preferred format. This will take place within 7 days after their plan is approved.

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You can remind a person they can access audible versions of information. They can do this by installing ReadSpeaker (external).

Access Request Form

The NDIS Access Request Form (ARF) is available in braille. All NDIA staff and partners who have an @ndis.gov.au email address can request an ARF in braille and have this sent by post directly to the NDIS applicant.

To order an ARF in braille, go to the Ordering NDIS products page on the intranet.

Funding for accessible formats

s47E(d) - certain operations of agencies

Article labels

PACE user role names

No change.

Topics

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Knowledge Article

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No change.

Case names

No change.

Ownership

No change.

Version control

Version	Amended by	Brief Description of Change	Status	Date
2.0	ED0024	Class 1 approval. Article formerly known as Appendix C – Accessible formats. CI: Planning cohort guidance updates. Transition Guide - Assisting communication from PG to PACE articles include PACE language and plain English update.	APPROVED	2023-08-18
2.0	AK0041	Class 1 approved Article ID: 310739223 Description: Added active published article links and labels.	APPROVED	2023-10-11
3.0	JGC135	Class 1 Approved. Update from CI Ticket SSI-3350. Highlighting need for Standard and Plan Corro preferences to be updated in PACE so those with accessible corro needs will have a corro request automatically send to NDIA external provider for production eg: Braille. **NOT PUBLISHED.**	APPROVED	2025-03-06

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4.0	JGC135	Class 1 Approved. New version approval after G&P feedback on SSI-4348. Solution design highlighting need for Standard and Plan Corro preferences to be correct in PACE so an accessible corro request will be sent automatically to NDIA external provider for production eg: braille.	APPROVED	2025-03-24

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Knowledge Article

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Book or update disability-related interpreting services for the participant

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

This article provides guidance for a business support officer, planner delegate, supporting officer, participant support officer or planner (non-partnered area) to:

- understand disability-related interpreting types
- confirm what type of disability-related interpreter the participant needs
- book disability-related interpreting services
- create a reminder for the booking
- confirm interpreter booking
- update or cancel a disability-related interpreter booking
- update or cancel an appointment booking.

Note:

- in this article we have used the term Deaf. We understand people will make their own choice about how they describe themselves and their disability or cultural identity
- local area coordinators and early childhood partners should follow their organisation's process for booking disability-related interpreting services.

Recent updates

20 October 2025

Section Book disability-related interpreting services updated to clarify that steps in this section are only for Service Delivery to follow.

Before you start

You have read and understood articles:

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- Guide – Assisting communication
- Check authority to book an appointment
- Create an appointment using the booking tool.

Understand disability-related interpreting types

You may need disability-related interpreting when communicating with participants who have a primary language of:

- **Auslan (Australian Sign Language)**: Auslan is the native language of the Australian Deaf community. It may be used by participants who are Deaf or hard of hearing. It's a visual and spatial language with its own grammar. Auslan is a combination of hand shapes, movements and facial expressions and has no written form. It's different to English and doesn't translate directly.
- **Deafblind, Visual frame, Tactile or Hand-over-hand:** these may be used by participants who are Deafblind.
- **Deaf Relay:** Deaf relay may be used by participants who are Deaf or hard of hearing and have additional communication needs. This may include Indigenous sign language, a foreign sign language or having limited language skills. Deaf relay work as part of a team alongside an Auslan interpreter.
- **Captioning:** captioning provides an instant readable alternative to spoken English. Offsite captioners listen to what is being said, transcribe the words, and then send the text over the internet to your screen within five seconds of it being said.
- **Notetaking:** notetaking provides a written document detailing spoken language created after the event. It can be used for audio-only or audio and video recordings.

This may include participants who are Deaf, Deafblind, or hard of hearing. For more information about communication supports, go to article Guide – Assisting communication.

Confirm what type of disability-related interpreter the participant needs

Use these steps to check if the participant needs disability-related interpreting to support communication with us.

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1. Check the participant's preferred communication method using article Check a person's preferred contact method.
2. Confirm the **Primary Language** displayed is **Auslan**.
3. Check if the **Interpreter Language** is Auslan.
4. If the participant:
   - uses Auslan as their **Primary Language** and doesn't have additional communication needs such as Deaf relay, go to section **Book disability-related interpreting services** in this article
   - is Deafblind, Deaf, or hard of hearing and has additional communication needs, confirm what type of disability-related interpreter they need.
5. Contact the participant using their **preferred contact method**. If their preferred contact method is:
   - **Telephone** or **TTY**, call the participant to ask what type of disability-related interpreter they need.

     Note: before you call the participant, you can send an SMS to let them know we're going to call them from a private number. To send an SMS in PACE, go to article Send an SMS in PACE.
   - **E-mail, Pager/SMS, SMS or Portal**, **DO NOT CALL**. There isn't a template in PACE. You can use the following example to confirm what type of disability-related interpreter the participant needs.

     Example:

     Hi Avery, you have an NDIS Check-in at 10:00am on Monday 29/09/2025 at NDIS 14 Auckland Street, Newcastle 2300 NSW.

     Please let us know what type of interpreter you need. For example, Auslan, Deafblind or Deaf relay.

     If you can't attend, please contact us on 1800 800 110 or email enquiries@ndis.gov.au.
6. **Log an activity** to record details of the conversation in **Internal Notes**. For help recording internal notes, go to article Log an activity or internal note.

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7. Continue to section **Book disability-related interpreting services** in this article.

Book disability-related interpreting services

Service Delivery Groups nationally can book disability-related interpreting through 2 service providers who have been contracted to provide Auslan services.

The two providers are Auslan Services and Expression Australia. Both organisations provide services nationally. If the participant doesn't have a preferred interpreting service, you can pick which service you will book. For:

- Auslan Services, go to section **Auslan Services online booking** or **Auslan Services phone booking** in this article
- Expression Australia, go to section **Expression Australia online booking** or **Expression Australia phone booking** in this article.

Other workgroups will need to follow their current process for booking an interpreter. If your workgroup requires Auslan interpreting services on an ongoing basis, contact the procurement team through the Procurement Service Desk to secure a contract.
If you're a staff member or business area needing to book Auslan interpreting services for accessibility within the workplace, please go to Deaf and hard of hearing.

Auslan Services online booking

1. Go to Auslan Services (external).
2. Select **Book An Interpreter Now**.
3. Log in using:
   - **Username:** s47E(d) - certain operations of agencies
   - **Password:** s47E(d) - certain operations of agencies

     Note: log-in details will show as NSW/ACT; however, this account is to be used nationally.
4. Select **New Booking**.
5. Record information about the **Deaf Participant**.
6. Include the **Deaf Participant Email** or **Deaf Participant Mobile** to make sure the participant receives confirmation of the booking.

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7. Select the participant's **Communication Requirements**. This may include:
    - **Auslan**
    - **Tactile/Hand over hand**
    - **Visual Frame**
    - **Relay**
    - **Other**.
8. Select **Next**.
9. Record details about the booking, including:
    - **Date**
    - **Start Time**
    - **End Time**.
10. Confirm the type of booking the participant needs. For:
    - remote video conferencing platforms, go to section **Video remote interpreting appointments** in this article
    - in person interpreting, go to section **Face to face meetings** in this article.

Video remote interpreting appointments

1. Confirm the:
    - **State**
    - **Video App/Platform**
    - **Video link/Number**
    - **On-site Contact Person**
    - **On-site Contact Phone or Mobile**.
2. Select **Next**.
3. Continue to section **Appointment details** in this article.

Face to face meetings

1. Include the booking location. Search for the address or record the:
    - **Street**

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- **Suburb**
- **State**.

2. Confirm the:
   - **on-site Contact Person**
   - **on-site Contact Phone or Mobile**.

     Note: this may include the planner or person running the meeting.
3. Select **Next**.
4. Continue to section **Appointment details** in this article.

Appointment details

1. Select **Visible to Deaf Participant** to make sure the participant receives confirmation of the booking.
2. Confirm the **Number of Interpreters Needed**.

   Note: if the meeting is likely to be longer than one hour, you must book two interpreters to comply with work health and safety requirements.
3. Provide as much information as possible to support the booking.
4. Select **Working with Children Check Required**.

   Note: this needs to be selected.
5. Confirm the **Type of Appointment**. Select **Meeting/Appointment**.
6. Confirm the **Booking Nature Detail**. Select **NDIS plan appt**.
7. Select **No Filming** from the drop-down options.
8. Record a **Brief description of what will be discussed**. Make sure you include information about the purpose of the meeting. The information you enter here will help the interpreter prepare for the meeting and make sure the participant has the best possible experience. For example:

   Check-in:

   Check-in conversation to:
   - check how they're going with their plan
   - ask how they're going with their goals, and if they want to change or add new ones

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- check if there are any changes to their situation
- make sure their plan is working for them and they have the right supports
- check if they have any issues managing or using their budget
- identify and address any concerns
- make sure any new reports and evidence are uploaded.

Plan meeting:

Plan meeting to talk about:

- personal goals and supports, including informal, community and mainstream supports
- their budget, including the amounts, categories and how their budget was developed
- supports included and not included, including why
- any budget changes
- fund management. This may include self-management, using a registered plan manager or Agency-managed fund management.

Implementation meeting:

Implementation meeting to help:

- understand their plan
- understand how to use their plan and start using it
- understand fund management and how supports are paid
- connect with services and providers of their choice
- understand service agreements
- get answers to any questions.

9. Select **Next.**
10. Record your details for:
    - **Booking Requested By**
    - **Requestor Phone Number**
    - **Requestor Email**.
11. Make sure the booking details are correct before you select **Finish.**

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12. Continue to section **Record details of the booking** in this article.

Auslan Services phone booking

1. Call Auslan Services on 1300 287 526.
2. Give the operator the NDIS login details:
   - **Username:** s47E(d) - certain operations of agencies
   - **Password:** s47F - personal privacy, s47E(d) - certain operations of
3. Follow instructions provided by the operator to book the appointment.
4. Continue to section **Record details of the booking** in this article.

Expression Australia online booking

1. Go to Expression Australia (external).
2. Log in using:
   - **Email:** s47E(d) - certain operations of agencies@ndis.gov.au
   - **Password:** s47E(d) - certain operations of agencies
3. Select **+ New Booking** and **Next**.
4. Update **Booking Requested By**. Select **Change** to record your details.
5. Confirm if the booking will be **On Site** or **VRI**.
   - **On Site**: On site interpreting is for any face-to-face meetings.
   - **VRI:** VRI is Video Remote Interpreting which is provided through on-demand virtual conferencing platforms.
6. Confirm what type of service the participant needs. Select:
   - **Auslan**
   - **Deaf**
   - **Deaf Blind**
   - **Captioning**
   - **Notetaking**

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- **Other Language Needs**.

7. Confirm the **Number of** interpreters required for each category.

   Note: if it's likely the meeting will be longer than one hour, you need to book two interpreters to comply with work health and safety requirements.

8. Select **Next.**

9. Confirm **Appointment Details**, including:

   - **Date of appointment**
   - **Start time**
   - **End time**
   - **Address**.

10. Record the **Contact Person at Booking**. This may include the planner or person running the meeting. Including:

    - **Contact first name**
    - **Contact last name**
    - **Contact email**
    - **Contact number**.

11. Select **Next.**

12. Confirm the **Nature of appointment**. Select **OTHER.**

13. Enter the **Number of people attending**.

14. Record **Notes for the Interpreter (brief description of what will be discussed)**. Make sure you include information about the purpose of the meeting. The information you enter here will help the interpreter prepare for the meeting and make sure the participant has the best possible experience. For example:

    Check-in:

    Check-in conversation to:

    - check how they're going with their plan

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- ask how they're going with their goals, and if they want to change their goals or add new ones
- check if there are any changes to their situation
- make sure their plan is working for them and they have the right supports
- check if they have any issues managing or using their budget
- identify and address any concerns
- make sure any new reports and evidence are uploaded.

Plan meeting:

Plan meeting to talk about:

- personal goals and supports, including informal, community and mainstream supports
- their budget, including the amounts, categories and how their budget was developed
- supports included and not included, including why
- any budget changes
- fund management, this may include self-management, using a registered plan manager or Agency-managed fund management.

Implementation meeting:

Implementation meeting to help:

- understand their plan
- understand how to use their plan and start using it
- understand fund management and how supports are paid
- connect with services and providers of their choice
- understand service agreements
- get answers to any questions.

15. Select **Next.**

16. Record information about the **Auslan user**, including:

- **Auslan user first name**
- **Auslan user last name**.

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17. Include the **Auslan user email** or **Auslan user number** to make sure the participant receives confirmation of the booking.
18. Select **Next.**
19. Check **Preferences** are correct.

    Note: make sure **Working with children check** is selected.
20. Select **Next.**
21. Make sure **Billing details** are correct.
22. Select **I agree to Terms & Conditions** before you select **Finish**.
23. Continue to section **Record details of the booking** in this article.

Expression Australia phone booking

1. Call **Expression Australia** on **13 93 74** and tell the operator log in details:
   - **Email:** s47E(d) - certain operations of agencies@ndis.gov.au
   - **Password:** s47E(d) - certain operations of agencies
2. Follow instructions provided by the operator to book the appointment.
3. Continue to section **Record details of the booking** in this article.

Record details of the booking

1. Return to the **Person record** in PACE.
2. If you receive a confirmation email after you complete the booking, add the email document to the person account or case. Use article Add documents to a case.
3. **Log an activity** to record details of the booking in **Internal notes**. For help recording internal notes, use article Log an activity or internal note.
4. Continue to section **Create a reminder for the booking** in this article.

Create a reminder for the booking

Use these steps to set a reminder to confirm the booking.

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1. Create a **New Task** to set the reminder. Make sure you record the following details:
    - **Subject**: Other.
    - **Due Date**: 3 days before the disability-related interpreting booking.
    - **Assigned To**: Add yourself or the person responsible.
    - **Name**: Leave blank.
    - **Related to**: Leave as default case.
    - **Reminder Set**: Checked.
    - **Date**: 3 days before the disability-related interpreting booking.
    - **Time**: Set for a time that suits you.
    - **Comments**: Contact the participant to confirm disability-related interpreting services.
2. Select **Save.**

Confirm interpreter booking

Use these steps to confirm the booking and if the participant still needs the interpreter.

1. At least 3 days before the booking, check the participant's **Preferred contact method** using article Check a person's preferred contact method.
2. If their preferred contact method is:
    - **E-mail,** the participant will be sent a reminder email 48 hours before the appointment. Check the case **Activity History** to confirm a reminder notification has been sent.
    - **Telephone or TTY**, call the participant to confirm the booking.
      Note: before you call the participant, you can send an SMS to let them know we're going to call them from a private number. To send an SMS in PACE, use article Send an SMS to the participant.
    - **Pager/SMS, SMS** or **Portal**, **DO NOT CALL**. There isn't a template in PACE. You can use the following example to confirm the booking with the participant.
      Example:

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Hi Avery, this is a friendly reminder about the NDIS check-in at 10:00am on Monday 29/09/2025 with Keith at NDIS 14 Auckland Street, Newcastle 2300 NSW.
If you can't attend, please contact us on 1800 800 110 or email enquiries@ndis.gov.au.

3. If the participant can't attend the meeting, make sure you:
    - cancel the interpreter booking with the provider. Go to section **Update or cancel a disability-related interpreter booking** in this article.
    - update the appointment booking, go to section **Update or cancel an appointment booking** in this article.

Update or cancel a disability-related interpreter booking

If you need to update or cancel a booking with:

- Auslan Services, go to section **Update or cancel booking with Auslan Services** in this article.
- Expression Australia, go to section **Update or cancel booking with Expression Australia** in this article.
  Note: where possible, make sure you cancel the interpreter booking with the provider at least 48 hours before the meeting to avoid cancellation fees.

Update or cancel booking with Auslan Services

1. Go to Auslan Services (external).
2. Log in using:
    - **Username:** s47E(d) - certain operations of agencies
    - **Password:** s47E(d) - certain operations of agencies
3. Select **Current Bookings**.
4. Locate the booking you need to update. To:
    - update the booking, select **Edit**
    - remove the booking, select **Delete.**

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Note: you'll be able to see all the bookings created by NDIA staff. For privacy reasons, don't open any bookings that aren't related to your participant. Talk to your team leader if a booking needs to be adjusted and the staff member who created the booking is not available.

5. Update the booking as needed.
6. Continue to section **Update or cancel an appointment booking** in this article.

Update or cancel booking with Expression Australia

1. Go to Expression Australia (external).
2. Log in using:
   - **Email:** s47E(d) - certain operations of agencies@ndis.gov.au
   - **Password:** s47E(d) - certain operations of agencies

     Note: you'll be able to see all the bookings created by NDIA staff. For privacy reasons, don't open any bookings that aren't related to your participant. Talk to your team leader if a booking needs to be adjusted and the staff member who created the booking is not available.
3. Update the interpreter booking as needed.
4. Continue to section **Update or cancel an appointment booking** in this article.

Update or cancel an appointment booking

1. Return to the **Person record** in PACE.
2. **Log an activity** to record details of the booking in **Internal notes**. For help recording internal notes, use article Log an activity or internal note.
3. Update the appointment booking using article Modify an appointment or Cancel an appointment.

Article labels

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Knowledge Article

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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
1.0	JS0082	Class 3 approval. New KA created to transfer content from SOP – Book disability-related interpreting for the participant.	APPROVED	2023-09-29
2.0	JS0082	Class 2 approval. Update includes: • new step to send an SMS to the participant before you call them • what article to use when you send an SMS to the participant in PACE • example of what to ask the participant when you confirm what type of	APPROVED	2024-02-28

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		disability-related interpreter they need.		
3.0	UFEX8	Class 1 approval. Section Book disability-related interpreting services updated to clarify that steps in this section are only for Service Delivery to follow.	APPROVED	2025-10-08

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