

PEDI-CAT

Details
Assessment
Documents
Case Activity

PEDI-CAT and PEDI-CAT (ASD)

Please confirm details are correct before launching the PEDI-CAT report.

NDIS Number:
Applicant/Participant name: **Angelina Bell**

* Date

Reminder to assessor: please do not enter any applicant/participant or representative identifying information (names or contact details) into the online Pearson's Q-Global system when you commence the assessment.

Save for later
Launch PEDI-CAT

Steps

- ✔ Functional Capacity Assessment
- ✔ Select an Authorised Representative
- ✔ Select Tools
- **Launch PEDI-CAT**
- Complete PEDI-CAT in Pearson
- Submission
- Confirmation



Topic 3: The Access Request Case in PACE

Version Control

Version	Amended by	Description	Status	Date
V2.0	RWP064	Links updated, Edits	Draft	04/03/24
V2.1	SSN695	Links and content updated	Draft	09/05/24
V2.2	SJT409	Links and content updated	Draft	01/08/2024
V3.0	AIA372	Legislation updates	Final	29/10/2024



Frontline Essentials

Making Connections, Applying and Access - Program Guide

The contents of this document are OFFICIAL.

Program guide to support the training for the Making Connections, Applying and Access facilitated modules. This program guide provides additional information to the PowerPoint for facilitators.

OFFICIAL

Table of Contents

Frontline Essentials	1
Making Connections, Applying and Access - Program Guide	1
Course Information	7
Session Outline	8
Frontline Essentials: Making Connections, Applying and Access	19
Welcome and Introduction	19
Acknowledgement of Country	19
Accessibility	20
Housekeeping	20
Session Outline: Day 1	22
Learning Outcomes: Day 1	23
Program Overview	23
New Starter Essentials: Recap Quiz	24
Recap Quiz: Partners	25
Topic 1: Pathway and Roles	26
NDIS Pathway	27
Group Activity 1: Let's Learn the Terms	28
Making connections	29
Recording information	30
Using the information	31
Who Provides Early Connections and Community Connections?	32
Early connections and community connections	32
Group Discussion: Skills and behaviours	34
Topic 2: Early Childhood Approach	35
Working with Children and their families	35
Early Childhood Approach	37
Early connections	38
Scenario: Noah	40

OFFICIAL

Group Activity 2: Noah	40
Topic 3: Local Area Coordination Approach	42
Local Area Coordination Key Focuses	43
Topic 4: Community Connections Case	44
Community Connections Case and Plan	45
Would a Community Connections plan be suitable?	46
Community Connections Case	47
Pace Training Environment	48
Sally Stevens Scenario	49
Create a person account demonstration	50
Topic 4: My Profile	53
My Profile	53
About Me: Conversation Prompts	55
Group Activity 3: About me	56
Goals	58
Group Activity 4: Guided Questions	59
Group Activity 4: Option 2 – Goals for Children	61
Any final questions?	62
Self-Directed Learning	63
Day 2 Making Connections	64
Welcome and Introduction	64
Acknowledgement of Country	64
Accessibility	65
Housekeeping	66
Session Outline: Day 2	67
Learning Outcomes: Day 2	68
Recap quiz: Day 2	69
Recap quiz: early connections	69
Recap quiz: community connections	70
Topic 1: Informal, community and other government supports	71
Informal, community, and other government Supports	72

OFFICIAL

OFFICIAL

Informal Supports	73
Community supports	74
Other government supports	75
Ecomap	76
Scenario: Bri	78
Group activity 5: Bri's ecomap	79
Topic 2: The community connections case	80
Scenario: Sally Stevens	80
Community Connections Case demonstration	81
Questions: Bri	86
Topic 3: Tools used to gather information	88
Developmental concerns or developmental delay	88
The ASQ for an early childhood partner	90
The PEDICAT	91
Topic 4: Early supports	92
Early supports	92
Group Activity 7: Early supports plan demonstration	93
Noah: Scenario	94
Group discussion: Noah	94
Apply to the NDIS	97
Group discussion	98
Topic 5: Applying to the NDIS	100
Applying to the NDIS	100
Who completes the access request case?	101
Topic 6: Information gathering	102
Access and eligibility	102
Access requests: Limitations	103
Identity evidence for an access request	104
Information gathering cases	105
Streaming	107
Streaming demonstration	108

OFFICIAL

OFFICIAL

Personal and Environmental Circumstances (PEC)	110
PEC demonstration	111
Questions	112
Day 2: Self-directed learning	112
Day 3: Applying and access	113
Acknowledgement of Country	114
Accessibility	114
Housekeeping	115
Session outline: Day 3	117
Learning outcomes: Day 3	117
Recap quiz: Day 3	118
Recap quiz: Ecomaps	119
Recap quiz: Early support plans	120
Recap quiz: Streaming	121
Recap quiz: Cases	122
Topic 1: Information gathering	124
Short Form Outcomes Framework (SFOF) Questionnaire	124
SFOF	126
Supporting the family member or caregiver to answer questions	127
SFOF demonstration	128
Topic 2: Functional capacity assessment	131
Functional capacity assessment	131
Types of functional capacity assessments	132
Individual Activity: Who can complete what assessment?	134
Individual Activity: Debrief	135
Functional capacity assessments	136
Completing a functional capacity assessment	137
Internal disability specific severity tools	139
Locating resources	139
Example MS	140
Group Activity 6: Using severity tools	141

OFFICIAL

OFFICIAL

Assessment not specific to a disability type	143
WHODAS demonstration	144
PEDI-CAT	146
Topic 3: The Access Request Case in PACE	147
Access request demonstration	147
Who completes the access request process?	149
Group Activity 9: Applying scenarios	149
Group Activity 9: Scenario 1	150
Group Activity 9 Debrief: Scenario 1	151
Group Activity 9: Scenario 2	153
Group Activity 9 Debrief: Scenario 2	154
Group Activity 9: Scenario 3	156
Group Activity 9 Debrief: Scenario 3	157
Topic 4: The Access Decision Case in PACE	158
Who completes the access decision process?	158
Access Officer	159
Access Assessor	159
Access decision scenarios	160
Access assessor scenarios	161
Topic 5: What happens next?	163
What happens next?	163
Recap	164
Day 3: Self-directed learning	165
National Disability Insurance Agency	167
Version Control	168

OFFICIAL

- next steps.

It is recommended that the following tabs should also be completed (but is not mandated):

- my NDIS Contact
- Ecomap
- Profile

3. What kind of information would be recorded about Bri in a community connections plan?

Put what you think in the chat, or raise your hand if you would like to share your thoughts.

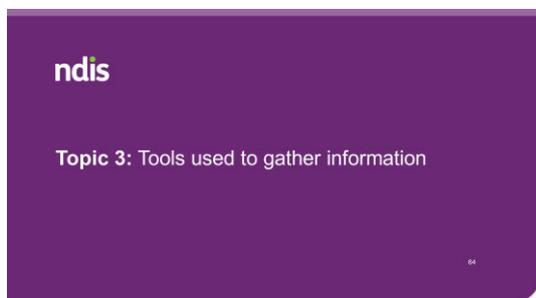
Facilitator notes: field responses for about 1-3 minutes

A community connections plan records information about the person, their goals, how they want to work towards their goals, next steps and what community and mainstream/other government supports may help.

Time: 10 minutes

Topic 3: Tools used to gather information

Display Slide 64



Topic 3: Tools Used to Gather Information

Developmental concerns or developmental delay

OFFICIAL

Display Slide 65

OFFICIAL

Developmental concerns or developmental delay

For children younger than 6, an early childhood partner gathers a range of information to determine if the child can be described as having developmental concerns or developmental delay. Some of the ways they may do this is through:

- Talking to families
- Reviewing information from professionals who know the child well
- Making observations of the child in their natural setting
- Completing an ecomap
- Implementing the Ages and stages questionnaire
- Implementing the PEDI-CAT
- Creating a person account plus a child representative account in PACE.

 OFFICIAL 65

Facilitator note: Advise learners to take note of this slide as this information can be used to assist them in an upcoming discussion.

State: Community connections plans are generally not generated for children younger than 6.

For children **younger than 6**, an early childhood partner gathers a range of information to determine if the child can be described as having developmental concerns or developmental delay. If the early childhood partner determines that a child is best described as having developmental concerns or if they are not yet sure if the description of developmental delay applies, early supports are offered to their family.

In areas that have early childhood partners, some of the ways they may gather information to determine if the child can be described as having developmental concerns or developmental delay is through:

- Talking to families
- Reviewing information from professionals who know the child well
- Making observations of the child in their natural setting
- Completing an ecomap
- Implementing the Ages and stages questionnaire
- Implementing the PEDI-CAT
- Creating a person account plus a child representative account in PACE.

Whilst a child who very clearly fits the description of developmental delay is best supported by applying for the NDIS, early supports is an appropriate option if their presentation is unclear.

Time: 3 minutes

The ASQ for an early childhood partner

Display Slide 66

OFFICIAL

The ASQ for an early childhood partner

The Ages and Stages Questionnaire (ASQ) is a developmental screening tool that Early childhood partners use to gather information about a child's development.

- It involves asking the child representative questions around the child's daily life, including development.
- A score is generated that is used to interpret if the child shows developmental concerns or developmental delay.
- This information provides supporting evidence for the applying to the NDIS, or for if early connections/ supports alone is the best pathway.

 OFFICIAL 66

State: The ASQ is a developmental screening tool that is used to gather information about a child's development. Early childhood partners use it to screen for delays in development. It is used, together with other information to help determine if a child has developmental delay or developmental concerns.

If you are an early childhood partner, spend some more time exploring these tools when you have time.

You can use the article to understand and identify the steps to complete the ASQ. Completing the ASQ involves asking the child representative a series of questions about how their child functionality, their development, and their daily life. A score is generated that is used to interpret if the child shows developmental concerns or developmental delay, along with other information. This information provides supporting evidence for the applying to the NDIS, or for if early connections/ supports alone is the best pathway.

You can search for the related knowledge articles using keywords in the training environment.

Time: 3 minutes

The PEDICAT

Display Slide 67

The PEDICAT

- We always use the PEDICAT assessment with children younger than 6
- Sometimes, we use PEDICAT for children aged 7 -16 if there isn't another tool available

ndis OFFICIAL 67

State: A PEDI-CAT assessment helps us understand a child's ability to complete tasks in their daily life.

We use the PEDI-CAT assessment with children younger than 6. Sometimes, we use PEDI-CAT for children aged 7-16 if there isn't another tool available.

The PEDI-CAT is a functional capacity assessment tool. It is used to measure a child's functional capacity when compared to other children of a similar age across four domains: daily activities, mobility, social/cognitive and responsibility.

There are two applications of the PEDI-CAT:

- To help determine functional capacity. In addition to the results of the ASQ and other information gathered, the PEDI-CAT can be used to help identify delays in development. Early childhood partners can use the PEDI-CAT when determining a child's support needs.
- To measure changes in functional capacity over time. The PEDI-CAT can be used to help measure changes in functional capacity over time in response to early childhood intervention. It is completed by the early childhood partner at both the commencement and the completion of early supports.

Time: 2 minutes

OFFICIAL

State: Some assessments you can complete, but it is important to check as many require a health professional.

When we're deciding if a participant is eligible for the NDIS, we look at:

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

We weigh evidence based on what we consider 'best practice', or highest quality. We generally prefer evidence that comes from a treating professional who:

- is the most appropriately qualified person to provide evidence of the person's primary disability
- has treated the person for a significant period of time (at least six months)
- is registered to practise in Australia or New Zealand
- provides disability evidence (such as a medical report) that is original, genuine and specific to the person.

Time: 6 minutes

Functional capacity assessments

Display Slide 110

OFFICIAL

Functional capacity assessments

A **manual** assessment refers to any previously completed functional capacity assessments.

A **new** assessment refers to you completing a new PEDI-CAT or WHODAS assessment in PACE.

When collecting functional capacity assessment information, the score of an external assessment needs to be provided by:

- The person
- Their nominee
- Their child representative
- Their treating health professional

Different assessment tools may have requirements over who can administer them, such as qualified health professionals.

ndis

OFFICIAL

State: A manual assessment refers to any previously completed functional capacity assessments. When collecting functional capacity assessment information, the score of an **external assessment** needs to be provided by:

- The person
- Their nominee
- Their child representative
- Their treating health professional.

For example, a person might give you a report from their doctor and you will enter the scores from the report in PACE.

A new assessment refers to you completing a new PEDI-CAT or WHODAS assessment in PACE.

Time: 2 minutes

Completing a functional capacity assessment

Display Slide 111

OFFICIAL

Completing a functional capacity assessment

- Check for exceptions
- Log an activity in PACE
- Complete a new assessment



ndis

OFFICIAL

110

State: Before completing the assessment, check for any exceptions, including:

- if the person does not want to complete assessment
- if the person has a priority situation
- if there are any identified risks

- if they have reapplied within the last 6 months.

When contacting an applicant, participant, their provider, or authorised representative, you must:

- check their preferred communication method and authorisations
- log an activity.
- Read the related knowledge articles.

Complete a new assessment

You need to make the person feel comfortable when communicating. When you are talking to them face to face or over the phone, make sure you:

- prepare for the conversation
- understand the person-centred approach
- understand the question you are asking
- tailor wording from assessment questions
- build rapport
- actively listen
- manage expectations with the individual that this does not mean they will get a funded NDIS plan.

For more information, go to the [Conversation Style Guide](#).

To begin a functional capacity assessment, you must create a new **Functional Capacity Assessment** case within PACE. You can follow the steps in the knowledge article relating to creating new functional capacity assessments to do this.

Time: 3 minutes

Internal disability specific severity tools

Display Slide 112

OFFICIAL

Internal disability specific severity tools

The internal disability specific severity tools that can be completed by Agency staff and partners include:

- Gross Motor Function Classification Scale (GMFCS) for **Cerebral Palsy**
- Modified Rankin Scale (mRS) for **Stroke**
- Disease Steps for **Multiple Sclerosis**
- **Hearing** tool
- **Vision** tool



 111

OFFICIAL

State: The internal disability specific severity tools that can be completed by Agency staff and partners include:

- Gross Motor Function Classification Scale (GMFCS) for Cerebral Palsy
- Modified Rankin Scale (MRS) for Stroke
- Disease Steps for Multiple Sclerosis
- Hearing tool
- Vision tool

The internal tools can be found on the intranet and the score updated in the Functional capacity case.

Time: 2 minutes

Locating resources

Display Slide 113



Facilitator Demonstration

State: I'm going to show you where we find these tools.

Show learners where the severity tools are located on the intranet.

Home>Service Delivery>Pre-Planning>Topic: Your Plan>Update Severity Indicator Tools. Docx (769KB).

[Pre-Planning \(ndia.gov.au - external\)](https://ndia.gov.au)

Time: 5 minutes

Example MS

Display Slide 114



State: Let's have a look at the disease steps classification scale and what this may look like with a person who lives with MS.

The disease steps classification scale assesses the level of impact multiple sclerosis has on the participant's daily activities. We use this where they have identified multiple sclerosis as their primary disability.

OFFICIAL

To do a multiple sclerosis assessment, use one of these sources in preference order:

- **Disease steps:** for all ages – provided by a medical professional or equivalent.
- **Multiple sclerosis severity tool:** for all ages - Patient Determined Disease Steps (PDDS), available on the [NDIS intranet](#). Provided by a medical professional or equivalent or completed internally.
- **Expanded Disability Status Scale (EDSS):** for all ages – provided by a medical professional or equivalent.

Note: Evidence from a treating health professional should be from a neurologist or a disease steps trained nurse examiner. It is really important to note who has completed the reports, as certain reports are required to be completed by specific professionals. For example, Autism Spectrum Disorder requires a diagnosis by a Clinical psychologist, paediatrician, or a psychiatrist stating ASD Criteria has been met. A diagnostic assessment from a general psychologist or an occupational therapist would not be accepted.

Time: 5 minutes

Group Activity 6: Using severity tools

Display Slide 115

OFFICIAL

Group Activity 6: Using severity tools

1. Use the Intranet to locate the [Update Severity Indicator – Multiple Sclerosis tool](#)
Home > Service Delivery > Pre-Planning > Topic: preparing for Planning > Update Severity Indicator - Multiple Sclerosis
2. Watch Sonia's video: [Andrew and Sonia - Lived Experience \(external\)](#)
Home>Service Delivery>Disability Navigator>Multiple Sclerosis
3. In your groups, complete the Multiple Sclerosis severity tool for Sonia

 114

OFFICIAL

State: We are going to complete an activity using one of the tools. The severity tool helps to understand the support needs and can help us see how the disability impacts their daily life.

Let's look for that tool together in the service delivery tab.

Facilitator Note: Demonstrate finding the correct tool. Home>Service Delivery>Pre-planning>Topic: Your Plan>Update Severity Indicator – [Multiple Sclerosis Tool.docx \(763KB\)](#)

State: We're going to watch a video about Sonia, and then in your groups, you will determine what functional capacity she is by using the Multiple Sclerosis Severity Tool. Sonia's video can be located under multiple sclerosis on the disability navigator.

Facilitator note: Demonstrate finding Sonia's video. Home>Service Delivery>Disability Navigator>Multiple Sclerosis>[Andrew and Sonia lived experience.](#)

Break learners into three groups to complete the Multiple Sclerosis tool.

Debrief: Display the Multiple Sclerosis Tool on the screen and review the answers together as a group.

Facilitator note: Possible answers below

1. What symptoms do you have due to your MS?
Loss of function in hands and legs, fatigue, balance issues, poor heat regulation, poor self-management of bladder/bowel.
2. Do your symptoms have any effect on your activity level or lifestyle?
Yes – has never been able to work full-time due to MS, and took a long time to find paid employment (12-13 years after diagnosis). Needs a home with climate control (a/c), no steps and which has good accessibility including a toilet close to bedroom – not always available in rentals, and due to income limitations has always rented.

3. If so, what is that level of effect on your lifestyle for example, minor, moderate, severe?

Moderate to severe

4. After an attack, do you return to normal?

Currently stable – no active decline happening

5. Does your MS interfere with your walking?

Yes – walks over very short distances, motorised wheelchair over longer distances

6. Do you use a mobility aid?

Yes

7. If so, what type?

Motorised wheelchair

Evaluation of results: Sonia's main form of mobility is a wheelchair, which equates to level 7 of the patient determined disease step. The Disease Steps Scale to be entered into the system is 6.

Time: 25 minutes (15 minutes for activity and 10 minutes for debrief)

Assessment not specific to a disability type

Display Slide 116

OFFICIAL

Assessment not specific to a disability type

If there are no relevant disability specific assessments or internal disability specific tools then we would use an assessment that is not specific to a disability type.

Assessments not specific to disability type:

- Can be completed by NDIA staff and partners
- Include PEDICAT (0-16) and WHODAS 2.0 (+17).




116

OFFICIAL

State: When there aren't any specific assessments for a person's disability, the PEDI-CAT or WHODAS would be completed.

The World Health Organisation Disability Assessment Schedule (WHODAS) is a series of questions for people 17 years of age and above. It assesses the individual's difficulty completing or undertaking tasks in different areas of their life. It helps us to understand the level of difficulty an individual experiences when doing different activities.

We complete the WHODAS assessment when we have no recorded evidence of other functional capacity assessments on file. We record the level of difficulty the participant has found when completing tasks in the past 30 days. The WHODAS can be used in addition to a disability-specific tool when required. This should not change the typical support package (TSP).

The PEDICAT is another assessment we can use for children. A PEDI-CAT assessment helps us understand a child's ability to complete tasks in their daily life.

We use the PEDI-CAT assessment with children younger than 6. Sometimes, we use PEDI-CAT for children aged 7-16 if there isn't another tool available.

Time: 2 minutes

WHODAS demonstration

Display Slide 117

WHODAS demonstration

We are now going to go through a WHODAS demonstration . During the demonstration, please take notes as you will complete a similar activity during your self-directed learning.

ndis

116

Facilitator Note: We are now going to complete a WHODAS Demonstration.

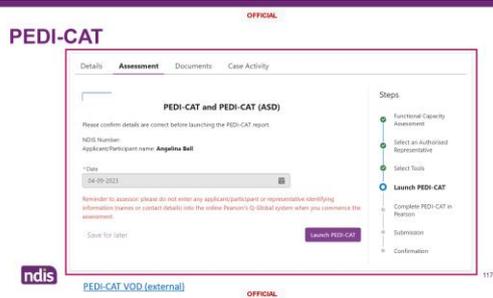
1. From the **Person Account**, in account view, select **Cases** tab.
2. Select **New** in the top-right corner of the cases panel.

3. Select **Functional Capacity Assessment**.
4. Select **Next**.
5. In **Categorisation** section, select **Origin**.
6. Select **Save**.
7. From the functional capacity assessment view, select **Assessment** tab.
8. Select **Next**.
9. Select **No** for an authorised representative.
10. Select **Next**.
11. At the **Select Tools** step in the Functional Capacity Assessment:
12. Select **Yes** to Carry out a new assessment.
13. Select **WHODAS 12**.
14. Select **No** to Manually enter scores.
15. Select **Next**.
16. Ask learners to help you answer the questions listed based on what they know about Sally. Move the sliding scale indicator to a score between 1 and 5. Answers for Sally should range between None-Moderate depending on how the learners have interpreted her information.
17. Select **Next**.
18. Check the Confirmation details.
19. Select **Done**.

Time: 10 minutes

PEDI-CAT

Display Slide 118



State: The Pediatric Evaluation of Disability Inventory Computer Adaptive Test (PEDI-CAT) is a functional capacity assessment that is not specific to a disability.

Completing the PEDI-CAT will support the measurement of severity change over time for consistent reporting.

You can complete the PEDI-CAT if you are an:

- Early Childhood Partner
- Local Area Coordinator
- NDIS planner
- NDIS plan delegate.

Note: For children under the EC approach (0-6 years) the PEDI-CAT is administered by the Early Childhood Partner only.

Check that the person needs the PEDI-CAT assessment tool. Children aged:

- **0-6:** must have the PEDI-CAT score in addition to any other assessment tool
- **7-16:** only need the PEDI-CAT if a more appropriate tool can be recorded.

Conduct the PEDI-CAT assessment with the person and/or their Child Representative.

Version Control

Version	Amended by	Description	Status	Date
V2.0	RWP064	Updated links, Edits	Draft	04/03/24
V2.1	SSN695	Updated Content	Draft	08/05/24
V2.2	SJT409	Updated Content	Draft	01/08/24
V2.3	AIA372	Legislation updates	Final	29/10/2024

Making Connections, Applying and Access

Learner Workbook: Answer Guide



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

This learner workbook answer guide is to support the training for the Frontline Essential facilitated modules. This answer guide supports facilitators in correcting the self-directed activities in the learner workbook.

OFFICIAL

Table of Contents

Welcome to the Frontline Essentials Program	4
Day 1 – Pre Session: Self-directed Learning	5
Task 1 – eLearning Making Connections	5
Task 2 – Our guidelines – Early connection	5
Task 3 – Booklet – Early childhood approach	6
Task 4 – Roles	8
Day 1 – Post Session: Self-directed Learning	9
Task 5 – Goals	9
Task 6 – Goal Setting	9
Task 7 – Contribute to Goal Achievement – Scenarios	10
Task 8 – Create a person account	14
Day 2 – Pre Session: Self-directed Learning	15
Task 9 – Ecomap	15
Task 10 – Informal, Community and Mainstream/Other Government Supports	15
Task 11 – Understanding Supports	19
Task 12 – NDIS and other government services	20
Task 13 – Community Connections and Early Supports Knowledge articles	22
Day 2 – Post Session: Self-directed Learning	23
Task 14 – Community connections case	23
Task 15 – eLearning Applying for the NDIS	23
Task 16 – Applying to the NDIS: Requirements	23
Task 17– Applying to the NDIS	24
Task 18 – Functional Impact	26
Task 19 – Applying for the NDIS in PACE	26
Day 3 – Pre Session: Self-directed Learning	27
Task 20 – eLearning Access decision	27
Task 21 – Participant streaming	27
Task 22 – Person and Environmental Circumstances questions (PEC)	30
Day 3 – Post Session: Self-directed Learning	33
Task 23 – Streaming case	33

Task 24 – PEC case	33
Task 25 – SFOF case	33
Task 26 – Functional capacity assessment case (WHODAS)	34
Appendix 1: Sally Stevens Profile	35
About Sally Stevens	35
Version Control	37

the top of the page. If you require additional support reach out to your buddy or team leader.

Task 26 – Functional capacity assessment case (WHODAS)

In the training environment locate the person account that you have been using in self directed learning and use knowledge articles to complete a Functional capacity case (WHODAS). Use the information in the appendix and the participant statement and goals that you have previously created for Sally Stevens to complete this task. Ensure that you are in the training environment before changing or creating any participant records. The way to check this is to ensure the words Sandbox:TRNENV appears in the heading band at the top of the page. If you require additional support reach out to your buddy or team leader.

Version Control

Version	Amended by	Description	Status	Date
V2.0	RWP064	Updated links, Edits	Draft	04/03/24
V2.1	SSN695	Updated Content	Draft	08/05/24
V2.2	SJT409	Updated Content	Draft	01/08/24
V2.3	AIA372	Legislation updates	Final	29/10/2024

Check-ins Program Guide Transition V2.2

The contents of this document are OFFICIAL.



Program guide to support the training
for the Check-Ins facilitated modules.

This program guide provides additional information to the
PowerPoint for facilitators.

Table of Contents

Check-ins Program Guide Transition V2.2	1
Course Information	4
Session Outline	5
Welcome and Introduction	9
Acknowledgement of Country	9
Accessibility	10
Housekeeping	10
Session Outline	12
Learning Outcomes	13
Recap quiz: Using your plan	14
Recap quiz: Support Connection	14
Recap quiz: Request for service	15
Where are we in the NDIS pathway?	16
Topic 1 Why we do Check-ins and the type of check-in	18
Why do we do Check-ins with participants?	18
Identify Risk Factors and Vulnerabilities	19
Teams Group Activity One	27
Would we explore this conversation further because there is a risk to the participant?	27
Group Activity 1 continued.	28
Types of Check-ins	29
Scheduled Check-ins	29
Discretionary Check-ins	30
Pre-reassessment Check-in	33
Topic 2 Who completes a Check in?	33
Who completes the Check-in?	34
Topic 3: Resources	36
Resources	36
Complete a Desktop Review	37

OFFICIAL

Learn more about the Participant	39
Team Group Activity Two – Research	42
Topic 4 The Check-in process in PACE	43
Scenario: Sally	43
Functional Capacity Assessment key points	44
Demonstration – Check-in PACE	45
Topic 5: Transitioning existing participants' plans from SAP CRM to PACE	51
Check information has correctly transitioned to PACE	52
Demonstration – Alerts in PACE	53
SAP CRM – Internal Use Radio Button	55
Team Group Activity Three: Scenarios	56
Scenario A – Kendra	57
Scenario B – Marcus	58
Scenario C – Isla	59
Group Activity 4: Scenarios	60
Group 1 – Charlotte	61
Group 2 – Mike	65
Group 3 – Wayne	67
Recap	69
Self-Directed Learning	69
Thank you	70
National Disability Insurance Agency	73

- Record request for internal review.

Group Three

- Complete Personal and Environmental Circumstances.
- Update functional capacity assessment.
- Complete SFOF.
- Initiate eligibility reassessment.

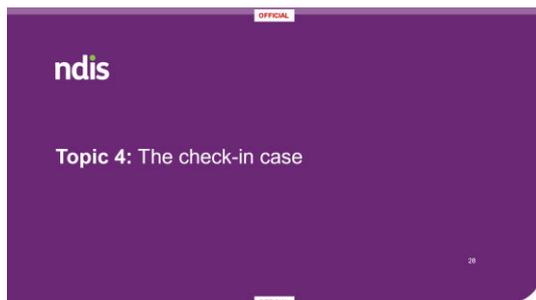
Activity duration: 10 minutes activity + 5 minute debrief. Ask learners to post their table or a snip in the chat

Debrief: Did you find the relevant materials, were they easy to locate? Feel free to raise your hand if you would like to share or pop your response in the chat.

Remember, our NDIA resources are updated regularly, so always make sure you are accessing the current version rather than saving a copy to your device.

Topic 4 The Check-in process in PACE

Display slide 27



State: Topic 4: The check-in case

Scenario: Sally

Display slide 28

OFFICIAL

The slide is titled "Scenario: Sally" and features the NDIS logo in the bottom left corner. The main text describes Sally's situation: "Sally's plan was approved three months ago. She has recently submitted a new Functional Capacity Assessment that highlights some new goals that she would like to pursue." To the right, a light blue box titled "Sally" contains a bulleted list of details: "24-year-old female", "Has a diagnosis of Moderate Intellectual Disability", "Lives with her parents and siblings", "Wants to get a job and be more independent", "Enjoys singing in choir and spending time with friends", "First plan was approved 3 months ago", and "A new functional capacity assessment has been submitted". The slide number "29" is visible in the bottom right corner.

State: Sally is our participant who we met during the last couple of weeks of training. She is a 24-year-old female with a diagnosis of moderate intellectual disability. Sally's first plan was approved 3 months ago which included funding for a functional capacity assessment to assess her ongoing needs. We have now received the new functional capacity assessment which recommends an increase in supports to work towards some new goals. We need to discuss this with Sally in a check-in meeting.

Time: 2 minutes

Functional Capacity Assessment key points

Display slide 29

The slide is titled "Functional Capacity Assessment key points" and features the NDIS logo in the bottom left corner. It contains two columns of bullet points. The left column, on a pink background, lists: "Sally can mobilise independently", "Sally requires prompting to shower and dress and is dependent on her family for meal preparation and cleaning tasks", "Sally has been accessing the community with her support worker and would like to build her skills to do this independently.", and "Sally would like to learn to catch the bus independently". The right column, on a green background, lists: "Sally has previously not engaged in skill building activities but wants to be as independent as possible.", "Sally requires increased therapy supports to increase her independent living skills", and "Recommendation: 1 hour per fortnight and 6 hours for report writing of Occupational therapy and 2 hours per week of skill development." The slide number "29" is visible in the bottom right corner.

State: Here are some key points from the Functional Capacity Assessment report that we received before our check-in with Sally. These reports are usually quite long documents however we have picked out a few points here which we can use when considering a check-in conversation. Sally's Functional Capacity Assessment report states that Sally can mobilise independently. She requires prompting to shower and dress and is fully dependent on her family for meal preparation and cleaning tasks. Sally has been accessing the community with her support worker and would like to build her skills to do this independently. Sally would also like to learn to catch the bus independently. The report notes that Sally has not previously engaged in skill

building activities but wants to be as independent as possible in the future. The report states that Sally requires increased therapy supports to develop her independent living skills. The Occupational therapist has recommended 1 hour per fortnight of Occupational therapy and an additional 6 hours for report writing as well as 2 hours of skill development with a support worker in Sally's next plan.

Ask: Are we required to include funding for all therapist recommendations in a participant plan?

Answer: No, support still need to be reasonable and necessary even if they are recommended by an Allied health professional.

Time: 5 minutes

Demonstration – Check-in PACE

Display slide 30

OFFICIAL

Demonstration – Check-in PACE

We are going to go through a demonstration of a check -in meeting. You will be completing a Check -in case in the training environment as part of your self-directed learning using the information we know about Sally.

 OFFICIAL 30

State: I am going to demonstrate how to complete the Check-in meeting for Sally using some examples of what could be included. It's important to remember that these are just examples and if you are unsure what to write or what to discuss in an check-in meeting you should refer to guidance in the knowledge articles or consult with your team leader or buddy. You will just be observing me complete this however you will practice this in the training environment after today's session.

If you need support or have any questions after this session your Team Leader or Buddy will go through this with you.

Facilitator Note:

1. From the **Person Account** screen, select **Cases**
2. Select **New**
3. Select **Check-in**
4. Select **Next**
5. At Reason Category, select from the drop down options
For Sally select **participant initiated**
6. At the Reason Code, Select **Potential Changes to current plan**
7. Select **Save**

State: We will need to book the check in meeting to be able to proceed with the case.

8. From the Check-in case, navigate to the **Activity bar** on the right
9. Select **More**
10. Select **New event**
11. At Search People bar, your details will automatically populate
Leave this as is
12. At **Start**, include the **date and time** of when the Check-in meeting is to occur
For Sally leave the **default date and time**.
13. At **End**, leave the **default date and time**.

State: If this was for a real participant you would enter the agreed date and time of the check in conversation.

14. At **Assigned To**, your name will automatically populate
15. At **Subject**, Select **Check-in meeting** from the drop-down options
16. At **Description**, add in any additional notes.
For Sally enter '**Check in due to new information provided.**'
17. At **Type**, select **phone**
18. At **Location**, include where the meeting is taking place
For Sally enter **Phone**

19. At **Interpreter** required, **No**
20. Select **Save**.

State: Before commencing any case it's important to review the guidance for success.

Facilitator Note: Draw learners attention to the Guidance for success in the top left hand corner of the case.

21. In the **Check-in case**, select the **Check-in tab**.
22. Select **Yes** for Sally
23. At **During this check-in, will you be supporting the participant and/or their family to prepare for an upcoming scheduled plan reassessment?**
Select **No**.
24. Select **Next**.
25. At **Participant and Authorised representatives**, select **Sally's** name and select the arrow facing right to move the name over to the **Attended** box
26. Select **Next**.
27. Review the About Me information.

State: In this section we can make updates to a persons About Me. Remember it's important for this to be in the participants own words.

28. Select **Next**
29. Demonstrate the goals screen.

Ask: Based on what we know about Sally can anyone think of a new goal she might want to add to her plan?

Field Answers

State: Sally might want to add that she wants to be able to take the bus by herself.

30. Select **Update**
31. In the **Update Request Info** screen at Update Requested by, select **Participant**

32. At **Update Reason**, select **person statement update**
33. Select **Next**
34. Select **New**
35. For **goal** enter: **I would like to be able to use the bus independently.**
36. For **how will I work towards this goal** enter: **I will work with my support team to develop my skills to manage money for the ticket price and learn where to get on and off so I don't get lost. My family will help me practice.**
37. Under this **goal relates to** select the boxes for **daily life and social and community activities.**
38. Select **Save.**
39. Select **Save**
40. Select **Next**
41. Display the **ICM** supports screen

State: We won't make any updates for Sally in this section today.

42. Select **Next**
43. Review the **Authorised Reps, Providers and Relationships** tab to ensure the information is still current and correct. If any of these need to be updated it will need to be done outside of the check in case.
44. Select **Next**
45. On the **budget and funded supports** screen select **No**
46. Select **Next**
47. On the **Changes in situation** screen select **Abilities and function**
48. In the **record strategies** box enter: **Functional capacity assessment received. Discussion with Sally on how to build her functional capacity using her current funded supports and utilizing community and mainstream supports.**
49. Under **is the participant likely to need their eligibility reassessed** enter **No**
50. Select **Next**

Ask: From what we know about Sally are there any signs of risk?

Field Answers

State: Based on the information we know about Sally there are not signs of risk

51. Select **No**

52. Select **Next**

53. From the **Next Steps** screen of the check-in case, select the relevant checkboxes. The checkboxes you select will automatically create the cases when you submit the check-in

State: We are selecting **plan change** case here because we have new information about Sally's functional capacity.

Ask: If this were a real participant and we had just received a functional capacity assessment what other boxes might we select?

Answer: Complete personal and environment circumstance, Update functional capacity assessment, Complete SFOF. This is because we will have new information on the participants capacity which may change the answers to these questionnaires.

54. At **are you scheduling the last check-in before a plan reassessment** select **No** (this is because the question is referring to scheduled reassessments.)

55. Leave the default check in date for this demonstration.

56. Select **next**

57. At **does the participant wish to receive a check in summary** select **no**.

58. Select **Next**

59. Review information and select **Submit**

60. If you receive an error message indicating that you can't progress due to tasks being open.

61. Select cancel

62. From the check in case select the **Case Activity tab**

63. Under the **Activity History** heading locate check in meeting

64. **Select** the drop down menu (arrow) on the right hand side

- 65. Select edit
- 66. Change event stage to completed
- 67. Select save
- 68. Go back to the check-in tab
- 69. Select submit

Table 2 – Version Control

Version	Description	Completed by	Date
1.0	First issue	KKL559	
1.1	Links added, spaces	Kht002	
1.2	Updated Slides Formatting of bullet points Slide numbering Timing table	Amelia <small>622(1)(a)(i) - B</small>	
1.3	Alt text / formatting	FEA036	23-10-23
1.4	Links, spacing	KHT002	25-10-23
2.0	Links updated	MJK078	
2.1	Content Updated	RWP064	02/05/24
2.2	PACE demonstrations added	RWP064	05/09/24



Frontline Essentials: Check-ins

Week 4: Day 2

[ndis.gov.au](https://www.ndis.gov.au) |



Session Outline

We will cover the following topics today:

Topic 1: Why we do check-ins and types of check-ins

Topic 2: Who completes a check-in

Topic 3: Resources

Topic 4: The check-in case

Topic 5: Transitioning existing participants plans from CRM to PACE



Learning Outcomes

In this session we will explore:

- Why we do check-ins with participants and the different types of check-ins.
- Who completes a check-in with a participant.
- The basics of the check-in process in PACE.
- Resources about participant check-ins.
- The transitioning participants plans from CRM to PACE process.





Topic 4: The check-in case

Scenario: Sally

Sally's plan was approved three months ago. She has recently submitted a new Functional Capacity Assessment that highlights some new goals that she would like to pursue.

- 24-year-old female
- Has a diagnosis of Moderate Intellectual Disability
- Lives with her parents and siblings
- Wants to get a job and be more independent
- Enjoys singing in choir and spending time with friends
- First plan was approved 3 months ago
- A new functional capacity assessment has been submitted

Functional Capacity Assessment key points

- Sally can mobilise independently
- Sally requires prompting to shower and dress and is dependent on her family for meal preparation and cleaning tasks
- Sally has been accessing the community with her support worker and would like to build her skills to do this independently
- Sally would also like to learn to catch the bus independently.

- Sally has not previously engaged in skill building activities but wants to be as independent as possible in the future.
- Sally requires increased therapy supports to develop her independent living skills
- Recommendation: 1 hour per fortnight and an additional 6 hours for report writing of Occupational Therapy. 2 Hours per week of skill development.

Demonstration – Check-in PACE

We are going to go through a demonstration of a check-in meeting. You will be completing a Check-in case in the training environment as part of your self-directed learning using the information we know about Sally.



Version Control

Version	Amended by	Description	Status	Date
Vers 2.0	MJK078 Maureen <small>b22(1)(a)(ii) - time</small>	Updating Links	Updated	05/03/2024
2.1	RWP064	Content Update	Final	2/05/24
2.2	RWP064	PACE Demonstrations added	DRAFT	05/09/24

Changes to your plan - Program Guide

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

Program guide to support the training for the Changes to your plan facilitated modules. This program guide provides additional information to the PowerPoint for facilitators.

OFFICIAL

Table of Contents

Changes to your plan - Program Guide	1
Course Information	4
Session Outline	5
Welcome and Introduction	8
Acknowledgement of Country	9
Accessibility	9
Housekeeping	10
Session Outline	12
Learning Outcomes	12
Recap quiz: Check-ins	13
Recap quiz: Discretionary check-ins	14
Recap quiz: Frequent check-ins	15
Topic 1: Legislation relating to Plan Changes	16
The NDIS Act	17
The NDIS Act Part 2	18
Plan Changes in the NDIS Act	18
S47A- New Additions to Legislation	20
Topic 2: Who completes the Plan Change process	21
The NDIS Pathway	21
Who completes the Plan Change process?	22
Topic 3: Plan Changes	24
Who can request a Plan Change?	24
Plan Variation s47a Decision framework	26
Group Activity 1: Plan Variation scenario	26
Plan Reassessment	28
Group Activity 2: Angus	28
No Reassessment	31
Group Activity 3: Scenarios	32

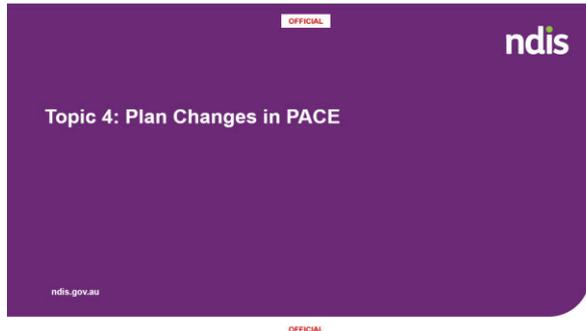
OFFICIAL

Group Activity 3: Scenarios Continued	33
Debrief Group 1 Scenario: Geoff	34
Debrief Group 2 Scenario: Bob	35
Debrief Group 3 Scenario: Alice	36
Debrief Group 4 Scenario: Ari	37
Topic 4: Plan changes in PACE	38
Demonstration: Plan Change Request	38
Topic 5: Leaving the NDIS	41
Leaving the NDIS – Children	41
Leaving the NDIS – Adults	43
Topic 6: Eligibility Reassessment	45
Eligibility Reassessment Referral	46
Demonstration: Eligibility Reassessment	47
Group Activity 4: Otis	49
Topic 7: Internal Review of decisions	51
What Decisions can be Reviewed?	51
Example of an Internal Review	52
Urgent Internal Reviews	53
What Internal Review Decisions can we make?	54
Learning Review	55
Recap quiz: Changes to your plan	56
Recap quiz: Plan reassessments	56
Recap quiz: Plan variation	58
Recap quiz: Eligibility reassessment	59
Self-Directed Learning	60
Table 2 – Version Control	62
National Disability Insurance Agency	63

OFFICIAL

Topic 4: Plan changes in PACE

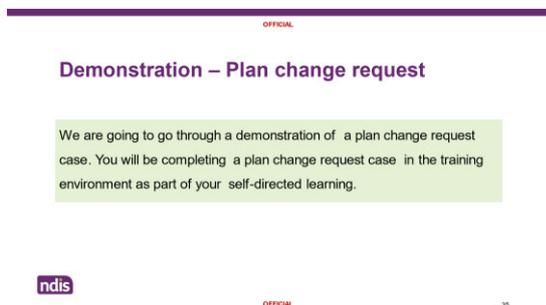
Display slide 31



State: You learned about a plan change request and a plan change case in these morning's self-directed eLearn, we are now going to look into this a bit more.

Demonstration: Plan Change Request

Display slide 32



State: I am going to demonstrate how to complete the plan change request case. It's important to remember that these are just examples, and you should refer to guidance in the knowledge articles or consult with your team leader or buddy. You will just be observing me complete this however you will practice this in the training environment after today's session.

If you need support or have any questions after this session your Team Leader or Buddy will go through this with you.

In this example, we have received a request from our participant Sally to initiate a plan reassessment, due to new functional capacity assessment being supplied and stating the plan no longer meets the participant's needs.

Initiate Request:

1. From the Person Account, select the Cases tab.
2. Select the plan change case from the list of open cases as we opened it during our check in case yesterday.

Plan change case:

1. In the plan change case, Select the request tab
2. Select Date (calendar) for Requested date. Leave it as the default date for the demonstration.
3. In How is the request being initiated? Select Participant requested - S48
4. In Who is requesting the plan change? Select Participant

Change in situation

1. In Changes in situation Select Functional capacity
2. In When did this change happen? Select a date in the last month

State: We would enter this as the date of the report.

3. In Provide details of the situation type New functional capacity assessment received with a request for additional supports
4. If the new plan requires a change in fund management, select the checkbox next to Change to fund management required. For this example, leave unchecked
5. Select Next

Document/Evidence:

Ask: What evidence that is related to the plan change case would we need to add to the evidence tab when we are prompted in this section?

Answer: The Functional Capacity Assessment Report

1. Select next.

Risk Matrix:

If you don't identify any risks:

Ask: Have we identified any risks for Sally?

Answer: No

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

Request Confirmation:

1. Select confirm.
2. Select submit.
3. Plan change case is completed.

Demonstrate: Show learners that the plan has now changed queue as the decision is awaiting approval.

Time: 15 minutes

Table 2 – Version Control

Version	Amended by	Description	Status	Date
V1.0	Amelia <small>s22(1)(a)(i) - Ir</small>	First Issue	Final	23/10/2023
V1.1	Kate <small>s22(1)(a)(i) - Irrelevant th</small>	Edited slide numbers and links	Final	24/10/2023
V2.0	RWP064	Updated links	Final	07/03/24
V2.1	RWP064	Updated Content	Final	03/05/24
V2.2	RWP064	Added PACE demonstrations & Legislation changes	Draft	06/09/24

Frontline Essentials: Changes to your plan

Week 4 Day 3



Session outline

Topic 1: Legislation relating to plan changes

Topic 2: Who completes the plan change process

Topic 3: Plan changes

Topic 4: Plan changes in PACE

Topic 5: Leaving the NDIS

Topic 6: Eligibility reassessment

Topic 7: Internal review of decisions



Learning outcomes

Through this session we will:

- Explore the NDIS legislation that relates to plan changes
- Discover who completes the plan change process
- Compare plan change types; variations and reassessments
- View plan changes in PACE simulations
- Explore leaving the NDIS
- Explain eligibility reassessment
- Understand internal review of decisions





Topic 4: Plan Changes in PACE

Demonstration – Plan change request

We are going to go through a demonstration of a plan change request case. You will be completing a plan change request case in the training environment as part of your self-directed learning.

Version control

Version	Amended by	Description	Status	Date
V0.1	SRP102	New	Draft	19/10/2023
V1.0		First Issue	Final	23/10/2023
V2.0	RWP064	Updated	final	07/03/24
V2.1	RWP064	Updated	Final	03/05/24
V2.2	RWP064	Updated	Draft	06/09/24

Overview – Early childhood approach - Facilitator Guide

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

Facilitator guide to support the training for the Overview - Early childhood approach facilitated module.

This facilitator guide is for facilitators and supplements the PowerPoint.



Table of Contents

Overview – Early childhood approach - Facilitator Guide	1
Course Information	6
Session Outline	7
Welcome and Introduction	9
Overview – Early childhood approach	9
Acknowledgment of Country	9
Accessibility	10
Housekeeping	10
Session outline	11
Learning outcomes	12
Topic 1: Best practice in early childhood intervention	14
Early childhood intervention	14
NDIS Code of Conduct, NDIS Practice Standards and Best Practice Guidelines	15
NDIS Code of Conduct	16
NDIS Practice Standards	17
Best practice in early childhood intervention and the early childhood approach	18
Best practice in early childhood intervention	18
Best practice in early childhood intervention continued	19
Best practice in early childhood intervention summary	20
National Guidelines for Best Practice in Early Childhood Intervention video	21
Collaborative teamwork practice – best practice model	21
Multidisciplinary model	22
Key worker approach	23
Activity: Explaining best practice	24
Topic 2: The early childhood approach	26
Early childhood approach overview	26
Early childhood approach overview continued	27
Early childhood approach video	27

OFFICIAL

Early connections video	28
Types of early connections	29
Example resources that can be used by early childhood partners in early connections	30
Ecomaps	31
Activity: Ecomap	32
Early supports	33
Examples of early supports activities	34
Activity: Suzy	35
Support for children who are participants of the NDIS	36
Early childhood supports	36
Topic 3: Eligibility for the NDIS	38
Early intervention requirements (section 25)	39
Disability requirements (section 24)	40
Developmental delay	41
Evidence of developmental delay form	42
Eligibility reassessment	44
Eligibility reassessment continued	45
Eligibility reassessment referral	47
Eligibility conversations	47
Eligibility conversations continued	48
Eligibility conversations continued 2	49
Voluntarily leaving the NDIS	49
Activity Eligibility scenarios	50
Activity continued	51
Activity continued 2	52
Topic 4: Functional assessment and screening	53
Developmental milestones	53
Paediatric Evaluation Disability Inventory Computer Adaptive Test (PEDI-CAT)	54
Ages and stages questionnaire (ASQ)	55
Activity: Developmental milestones discussion	56

OFFICIAL

OFFICIAL

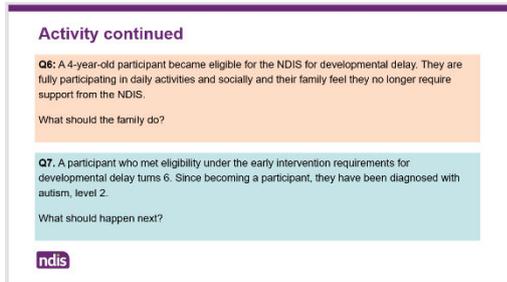
Topic 5: Case scenarios	57
Declan case scenario	57
Declan case scenario continued 1	58
Declan case scenario continued 2	59
Declan case scenario continued 3	59
Activity Declan case scenario	60
Lucy case scenario	61
Lucy case scenario continued 1	62
Lucy case scenario continued 2	62
Lucy case scenario continued 3	63
Lucy case scenario continued 4	64
Lucy case scenario continued 5	64
Lucy case scenario continued 6	65
Activity Lucy case scenario	66
Lin case scenario	67
Lin Case Scenario Continued 1	68
Lin Case Scenario Continued 2	68
Lin Case Scenario Continued 3	69
Lin Case Scenario Continued 4	70
Lin Case Scenario Continued 5	70
Topic 6: A family perspective	75
Family perspectives videos	75
Topic 7: Quiz – True or false?	76
1.True or false	76
2.True or false	77
3.True or false	78
4.True of false	79
5.True of false	80
Questions	81
Accessible version slides	81
Accessible version – the early childhood approach	82

OFFICIAL

Accessible version – early connections	83
Accessible version – multidisciplinary model	84
Accessible version – collaborative teamwork practice model	85
Version Control	86

Activity continued 2

Display Slide 51

A slide titled "Activity continued" with two questions and their corresponding prompts. The first question (Q6) is on an orange background and asks what the family should do. The second question (Q7) is on a light blue background and asks what should happen next. The NDIS logo is at the bottom left.

Activity continued

Q6: A 4-year-old participant became eligible for the NDIS for developmental delay. They are fully participating in daily activities and socially and their family feel they no longer require support from the NDIS.

What should the family do?

Q7: A participant who met eligibility under the early intervention requirements for developmental delay turns 6. Since becoming a participant, they have been diagnosed with autism, level 2.

What should happen next?

ndis

State:

Question 6: A 4-year-old participant became eligible for the NDIS for developmental delay. They are fully participating in daily activities and socially and their family feel they no longer require support from the NDIS. What should happen next?

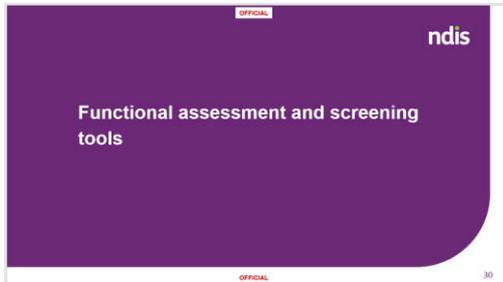
Answer: The early childhood partner should discuss voluntarily leaving the NDIS with the family and then support them with this.

Question 7: A participant who met eligibility under the early intervention requirements for developmental delay turns 6. Since becoming a participant, they have been diagnosed with autism, level 2. What should happen next?

Answer: They are referred for an eligibility reassessment and continue eligibility moving from meeting the early intervention requirements to disability requirements.

Topic 4: Functional assessment and screening

Display Slide 52



State: In this topic we will explore the functional assessment and screening tools. We will identify tools which may be used when considering the developmental skills and functional capacity of a child younger than 9.

Developmental milestones

Display Slide 53



Facilitator Note:

Place the links to the resources into the chat if training is delivered virtually.

The links will also be available in the learner workbook.

[Developmental Milestones and the EYLF and NQS \(external\)](#) and

[Raising Children Network \(external\)](#).

State:

The Developmental milestones and Early Years Framework and the National Quality Standards provide important information about developmental milestones for different age categories from birth to 5 years.

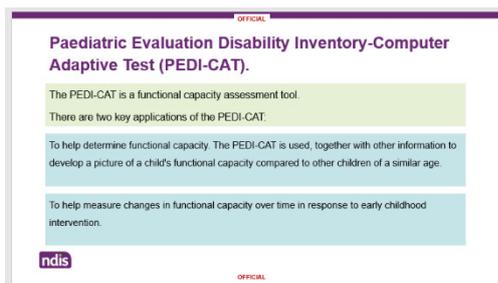
Whilst it is not a checklist of what all children should have reached by a particular age it provides examples of age-related milestones. This resource should be used as a source of information rather than a prescriptive checklist.

You can use it to help in your understanding of child development when considering participant information.

Additional information for children younger than 9 can be found on the [Raising Children Network \(external\)](#) website.

Paediatric Evaluation Disability Inventory Computer Adaptive Test (PEDI-CAT)

Display Slide 54



State:

The PEDI-CAT is a functional capacity assessment tool.

There are two key applications of the PEDI-CAT:

- To help determine functional capacity. The PEDI-CAT is used, together with other information to develop a picture of a child's functional capacity compared to other children of a similar age across four domains: daily activities, mobility, social/cognitive and responsibility.
- To help measure changes in functional capacity over time in response to early childhood intervention.

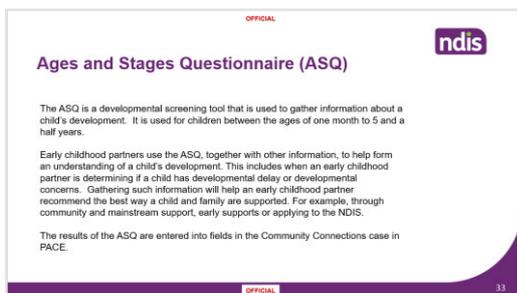
A PEDI-CAT can be completed when an early childhood partner is gathering information to understand the developmental profile of a child.

It must be administered by the early childhood partner before the commencement of, and at the completion of early supports. The PEDI-CAT is also administered when supporting a family of a child younger than 7 to apply for the NDIS using a Functional Capacity Assessment case in PACE. Also, for a participant younger than 7 at the check-in prior to the plan reassessment due date a PEDI-CAT will need to be completed.

However, if results of a recent PEDI-CAT are available, these can be recorded in PACE instead of completing a new PEDI-CAT.

Ages and stages questionnaire (ASQ)

Display Slide 55



State:

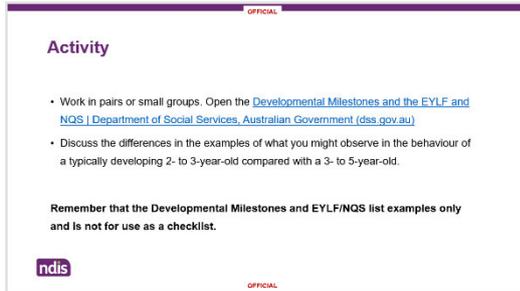
The ASQ is a developmental screening tool that is used to gather information about a child's development. It is used for children between the ages of one month to 5 and a half years.

Early childhood partners use the ASQ, together with other information, to help form an understanding of a child's development. This includes when an early childhood partner is determining if a child has developmental delay or developmental concerns. Gathering such information will help an early childhood partner recommend the best way a child and family are supported. For example, through community and mainstream/other government supports and services, early supports or applying to the NDIS.

The results of the ASQ are entered into fields in the Community Connections case in PACE.

Activity: Developmental milestones discussion

Display Slide 56



Activity

- Work in pairs or small groups. Open the [Developmental Milestones and the EYLF and NQS | Department of Social Services, Australian Government \(dss.gov.au\)](#)
- Discuss the differences in the examples of what you might observe in the behaviour of a typically developing 2- to 3-year-old compared with a 3- to 5-year-old.

Remember that the Developmental Milestones and EYLF/NQS list examples only and is not for use as a checklist.

ndis

State:

Work in pairs or small groups. Open the [Developmental Milestones and the EYLF and NQS \(external\)](#).

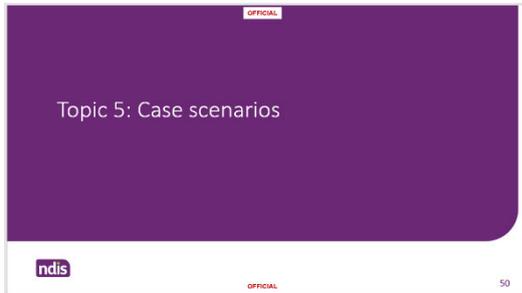
Discuss the differences in the examples of what you might observe in the behaviour of a typically developing 2- to 3-year-old compared with a 3- to 5-year-old.

Remember that the Developmental Milestones and EYLF/NQS list examples only and is not for use as a checklist.

Time: 10 minutes

Topic 5: Case scenarios

Display Slide 57

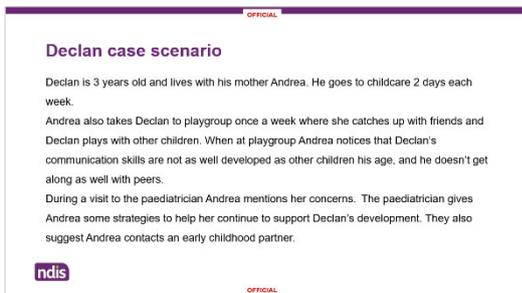


State:

We are now going to work on some case scenarios.

Declan case scenario

Display Slide 58



State:

Declan is 3 years old and lives with his mother Andrea. He goes to childcare 2 days each week.

Andrea also takes Declan to playgroup once a week where she catches up with friends and Declan plays with other children. When at playgroup Andrea notices that Declan's communication skills are not as well developed as other children his age, and he doesn't get along as well with peers.

During a visit to the paediatrician Andrea mentions her concerns. The paediatrician gives Andrea some strategies to help her continue to support Declan's development. They also suggest Andrea contacts an early childhood partner.

Declan case scenario continued 1

Display Slide 59

OFFICIAL

Declan case scenario continued

Andrea and Declan meet with an early childhood partner, at their home. Andrea and the early childhood partner discuss Declan's strengths and Andrea's concerns about Declan's development. They also complete an ecomap.

The early childhood partner observes Declan going about his usual activities at home and at childcare. She also talks to Declan's educators and uses tools like the ASQ and PEDI-CAT. The information gathered helps the early childhood partner understand Declan's development, strengths and functional capacity.

The early childhood partner determines that Declan's presentation is best described as developmental concerns and offers early supports, which Andrea accepts.

ndis

OFFICIAL

State:

Andrea and Declan meet with an early childhood partner, at their home. Andrea and the early childhood partner discuss Declan's strengths and Andrea's concerns about Declan's development. They also complete an ecomap.

The early childhood partner observes Declan going about his usual activities at home and at childcare. She also talks to Declan's educators and uses tools like the ASQ and PEDI-CAT. The information gathered helps the early childhood partner understand Declan's development, strengths, and functional capacity.

The early childhood partner determines that Declan's presentation is best described as developmental concerns and offers early supports, which Andrea accepts.

Declan case scenario continued 2

Display Slide 60

OFFICIAL

Declan case scenario continued

The early childhood partner provides support through a range of activities during early supports. For example, they:

- work with Andrea to develop and implement strategies at home and in the community to support Declan build his skills and increase his independence
- visit Declan at childcare and talk about strategies with staff to ensure a consistent approach to supporting Declan
- support Andrea to connect with community and mainstream supports such as a local community centre parent support group
- deliver group workshops on social skills and communication skills

ndis

OFFICIAL

State:

The early childhood partner provides support through a range of activities during early supports.

For example, they:

- work with Andrea to develop and implement strategies at home and in the community to support Declan build his skills and increase his independence.
- visit Declan at childcare and talk about strategies with staff to ensure a consistent approach to supporting Declan.
- support Andrea to connect with community and mainstream supports such as a local community centre parent support group.
- deliver group workshops on social skills and communication skills.

Declan case scenario continued 3

Display Slide 61

OFFICIAL

Declan case scenario continued

After a few months Declan's communication and social skills have improved. His speech is easier to understand and his interactions with other children have improved. Andrea and childcare staff feel more confident in supporting Declan's ongoing learning and development. Declan and Andrea no longer require early supports.

Early supports, delivered by the early childhood partner have sufficiently supported Declan and Andrea, without the need to apply to the NDIS.

ndis

OFFICIAL

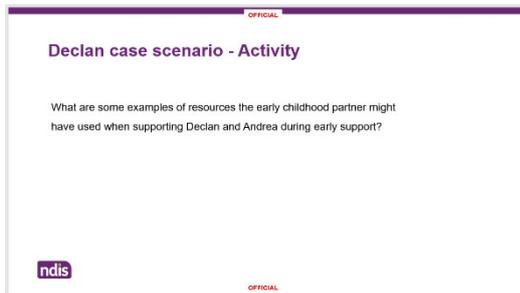
State:

After a few months Declan's communication and social skills have improved. His speech is easier to understand and his interactions with other children have improved.

Andrea and childcare staff feel more confident in supporting Declan's ongoing learning and development. Declan and Andrea no longer require early supports.

Early supports, delivered by the early childhood partner have sufficiently supported Declan and Andrea, without the need to apply to the NDIS.

Activity Declan case scenario

Display Slide 62**State:**

What are some examples of resources the early childhood partner might have used when supporting Declan and Andrea during early support?

Time: 5 minutes

Debrief

Examples could include:

Resources on the NDIA intranet [Early connections \(external\)](#) such as

- Booklet-Early childhood approach
- Tip Sheets. For example, on topics such as communication, play, behaviour, and best practice.
- The EC Applying best practice principles in early supports form.

[Our Guideline - Mainstream and community supports \(external\)](#)

[Support for carers from other agencies \(external\)](#)

Knowledge articles in PACE

[Raising Children Network \(external\)](#) website

Their established knowledge and network of local and national community and mainstream services.

Lucy case scenario

Display Slide 63

OFFICIAL

Lucy case scenario

Lucy is four years old. She really enjoys spending time with her younger brother, and her parents, Cassie and John in the backyard and going to the playground.

Cassie notices that Lucy needs help doing some things other children her age can do. She needs a lot more help than other children her age with things at home like the mealtime routine and dressing. She also needs a lot more support than other children her age at childcare with things like staying seated for story time and playing and communicating with friends. Cassie and Lucy's educator discuss the concerns. Lucy's educator suggests that Cassie contacts an early childhood partner.

ndis

OFFICIAL

State:

Lucy is four years old. She really enjoys spending time with her younger brother, and her parents, Samantha and John in the backyard and going to the playground.

Samantha notices that Lucy needs help doing some things other children her age can do. She needs a lot more help than other children her age with things at home like the mealtime routine and dressing. She also needs a lot more support than other children her age at childcare with things like staying seated for story time and playing and communicating with friends. Samantha and Lucy's educator discuss the concerns. Lucy's educator suggests that Samantha contacts an early childhood partner.

Lucy case scenario continued 1

Display Slide 64

Lucy case scenario continued 1

The early childhood partner meets with Samantha, John and Lucy at their preferred location, their home. The early childhood partner gathers information from various sources. For example, by speaking with Samantha and John, Lucy's educators and observing Lucy at home and childcare. They also use tools like the ASQ and ecomap.

After meeting with Samantha, John and Lucy several times the early childhood partner suggests that Samantha and John apply to the NDIS on behalf of Lucy because it is likely she meets the NDIS early intervention requirements for developmental delay.



State:

The early childhood partner meets with Samantha, John and Lucy at their preferred location, their home. The early childhood partner gathers information from various sources. For example, by speaking with Samantha and John and Lucy's educators and observing Lucy at home and childcare. They also use tools like the ASQ and ecomap.

After meeting with Samantha, John, and Lucy several times the early childhood partner suggests that Samantha and John apply to the NDIS on behalf of Lucy because it is likely she meets the NDIS early intervention requirements for developmental delay.

Lucy case scenario continued 2

Display Slide 65

OFFICIAL

Lucy case scenario continued 2

The early childhood partner also suggests that community support might help Lucy's family. They put the family in touch with a local peer support group so they can meet other families of young children.

Lucy becomes eligible for the NDIS and a NDIS plan is developed. The plan includes the goals Samantha and John have for Lucy and funding to support progress towards goals. The family use the funding to support them with strategies to help Lucy develop her social, self-care and communication skills and increase her participation in daily routines and the community.



OFFICIAL

State:

The early childhood partner also suggests that community support might help Lucy's family. They put the family in touch with a local peer support group so they can meet other families of young children.

Lucy becomes eligible for the NDIS under the early intervention requirements and a NDIS plan is developed. The plan includes the goals Samantha and John have for Lucy and funding to support progress towards goals. The family use funding to get early intervention through a key worker who provides strategies to help Lucy develop her social, self-care and communication skills and increase her participation in daily routines and the community.

Lucy case scenario continued 3

Display Slide 66

OFFICIAL

Lucy case scenario continued 3

Lucy turns 6. Since becoming a participant, she has made a lot of progress towards the goals in her NDIS plans.

She started school and Samantha is pleased with the additional support she is getting with learning. Her teacher says she has settled in, taking part in all activities and getting along well with her new friends. She is much more independent in completing daily routines at home too.

The key worker has worked with Samantha and Tom to develop strategies they can continue using at home to support Lucy.

ndis

OFFICIAL

State:

Lucy turns 6. Since becoming a participant, she has made a lot of progress towards the goals in her NDIS plans.

She started school and Samantha is pleased with the additional support she is getting with learning. Her teacher says she has settled in, taking part in all activities, and getting along well with her new friends. She is much more independent in completing daily routines at home too.

The key worker has worked with Samantha and John to develop strategies they can continue using at home to support Lucy.

Lucy case scenario continued 4

Display Slide 67

Lucy case scenario continued 4

The early childhood partner has had many conversations over the last two years with Samantha and John about the eligibility requirements of the NDIS.

They understand that Lucy no longer meets the early intervention requirements for developmental delay. They also understand that Lucy is likely to not meet the early intervention requirements or disability requirements for any other reason.

Lucy does not have impairment that is likely to be permanent. However, they do not want Lucy to leave the NDIS.



State:

The early childhood partner has had many conversations over the last two years with Samantha and John about the eligibility requirements of the NDIS.

They understand that Lucy no longer meets the early intervention requirements for developmental delay. They also understand that Lucy is unlikely to meet the early intervention requirements or disability requirements for any other reason. Lucy does not have an impairment that is likely to be permanent. However, they do not want Lucy to leave the NDIS.

Lucy case scenario continued 5

Display Slide 68

Lucy case scenario continued 5

The early childhood partner revisits the conversation about eligibility reassessments with Samantha and John and refers Lucy for an eligibility reassessment. They also confirm that Lucy, Samantha and John continue to remain well connected with community and mainstream supports.

The eligibility reassessment determines that Lucy is no longer eligible. Lucy and her family are supported to leave the NDIS. Samantha and John are prepared for this given the many conversations they have had with the early childhood partner and planner delegate about the eligibility requirements.

Lucy remains well supported by her family, school and the community.



State:

The early childhood partner revisits the conversation about eligibility reassessments with Samantha and John and refers Lucy for an eligibility reassessment. They also

confirm that Lucy, Samantha, and John continue to remain well connected with community and other government supports and services.

The eligibility reassessment determines that Lucy is no longer eligible. Lucy and her family are supported to leave the NDIS. Samantha and John are prepared for this given the many conversations they have had with the early childhood partner and planner delegate about the eligibility requirements.

Lucy remains well supported by her family, school, and the community.

Lucy case scenario continued 6

Display Slide 69

Lucy case scenario continued 6

- Lucy became eligible for the NDIS because she met the early intervention requirements for developmental delay.
- Over time her support needs changed. She no longer requires support from the NDIS.
- Also, a participant can only access the NDIS for developmental delay until they are 6.
- Lucy leaves the NDIS and remains well supported by her family, school and the community.

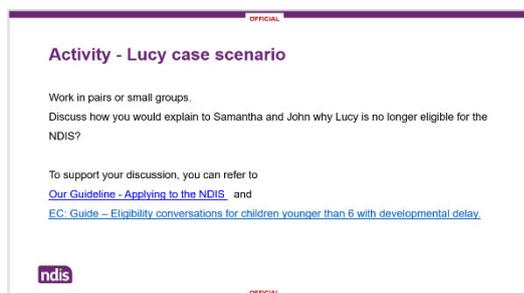
ndis

State:

- Lucy became eligible for the NDIS because she met the early intervention requirements for developmental delay.
- Over time her support needs changed. She no longer requires support from the NDIS.
- Also, a participant can only access the NDIS for developmental delay until they are 6.
- Lucy leaves the NDIS and remains well supported by her family, school, and the community.

Activity Lucy case scenario

Display Slide 70



Activity - Lucy case scenario

Work in pairs or small groups.
Discuss how you would explain to Samantha and John why Lucy is no longer eligible for the NDIS?

To support your discussion, you can refer to
[Our Guideline - Applying to the NDIS](#) and
[EC: Guide – Eligibility conversations for children younger than 6 with developmental delay](#)

ndis

State:

Work in pairs or small groups. Discuss how you would explain to Samantha and John why Lucy is no longer eligible for the NDIS?

To support your discussion, you can refer to:

[Our Guideline - Applying to the NDIS \(external\)](#) and
[EC: Guide – Eligibility conversations for children younger than 6 with developmental delay \(external\)](#).

Time: 5 minutes

Debrief:

Here are some examples of the things that you should include in the conversation with Samantha and John when explaining why Lucy is likely to no longer be eligible for the NDIS:

- A participant can only meet the early intervention requirements of the NDIS for developmental delay until they are 6 years old. As Lucy had turned 6, she cannot continue as a participant of the NDIS for developmental delay.
- Discuss Lucy's progress towards goals in her NDIS plan and her current functional capacity. Explain that Lucy is no longer likely to meet the early intervention requirements for developmental delay for reasons other than that she has turned 6. This is because what she can do now in everyday activities is similar to, or not significantly lower than what her same age peers can do.

You could use:

[What about children younger than 6 with developmental delay? \(external\)](#) to help explain this to Samantha and John.

- Reiterate the role of community and mainstream supports in providing ongoing support to Lucy and her family, for example school with educational learning and the health system.
- Revisit the conversation about the early intervention and disability requirements for impairments that are likely to be permanent. Explain that as there is not any evidence that Lucy has an impairment that is likely to be permanent, she is unlikely to meet ongoing eligibility requirements.

Lin case scenario

Display Slide 71

Lin case scenario

Lin is 3 and lives with her parents Simone and Thai. Lin becomes eligible for the NDIS under the early intervention requirements, for developmental delay.

Lin's first plan is approved, and Simone and Thai speak with several early childhood intervention providers to choose one. They contact Nully Early Childhood Services (Nully). The early childhood partner and planner have provided Simone and Thai with information on the National Guidelines- Best Practice in Early Childhood Intervention. Simone and Thai are pleased that the supports Nully offers is in line with these guidelines. They also feel that the early childhood professionals from this service understand Lin's needs and are best able to support them.

ndis

State:

Lin is 3 and lives with her parents Simone and Thai. Lin becomes eligible for the NDIS under the early intervention requirements, for developmental delay.

Lin's first plan is approved, and Simone and Thai speak with several early childhood intervention providers to choose one. They contact Nully Early Childhood Services (Nully). The early childhood partner and planner have provided Simone and Thai with information on best practice in early childhood intervention. Simone and Thai are pleased that the supports Nully offers is in line with best practice. They also feel that the early childhood professionals from this service understand Lin's needs and are best able to support them.

Lin Case Scenario Continued 1

Display Slide 72

Lin case scenario continued 1

Lin case scenario continued 1

Simone and Thai use funding from Lin's NDIS plan to pay for supports from Nully. This helps them work towards the goals in Lin's NDIS plan.

They work with the key worker to develop strategies to support Lin. Strategies are updated regularly as Lin's skills develop and they are shared with her early childhood educators.

Lin and her family are well supported by community and mainstream support too. Lin is now 5 and attends preschool she is getting ready to go to school next year.



State:

Simone and Thai use funding from Lin's NDIS plan to pay for supports from Nully.

This helps them work towards the goals in Lin's NDIS plan.

Simone and Thai work with the key worker to develop strategies to support Lin. Strategies are updated regularly as Lin's skills develop and they are shared with her early childhood educators.

Lin and her family are well supported by community and other government supports and services too. Lin is now 5, attends preschool and she is getting ready to go to school next year.

Lin Case Scenario Continued 2

Display Slide 73

OFFICIAL

Lin case scenario continued 2

Over the last two years, Lin has been made good progress towards the goals in her NDIS plan. It appears her presentation no longer meets the developmental delay definition in the [NDIS Act 2013](#).

This is because her functional ability in most areas now appears to be like her peers. The remaining concern her family have is that Lin is sometimes fussy with her food choices.



OFFICIAL

State:

Over the last two years, Lin has made good progress towards the goals in her NDIS plan. It appears her presentation no longer meets the developmental delay definition in the [NDIS Act 2013 \(External\)](#).

This is because her functional ability in most areas now appears to be like her peers. The remaining concern her family have is that Lin is sometimes fussy with her food choices.

Lin Case Scenario Continued 3

Display Slide 74

The slide content is as follows:

Lin case scenario continued 3

The early childhood partner meets with Simone and Thai and revisits the conversation about eligibility. Some examples of things the early childhood partner includes in the conversation are:

- Lin's progress towards goals
- Lin's current functioning and support needs. They use this information when referring to the eligibility requirements to explain why she is likely not to continue to be eligible
- Confirmation that sufficient mainstream and community supports are in place. They discuss the role of the health and education systems in providing ongoing support.
- Whether Lin's family would like Lin to voluntarily leave the NDIS.

The slide also features the NDIS logo in the bottom left and the word 'OFFICIAL' in the bottom right.

State:

The early childhood partner checks-in with Simone and Thai and revisit the previous eligibility conversations. Some examples of things the early childhood partner includes are:

- Lin's progress towards goals.
- Lin's current functioning and support needs. They use this information when referring to the eligibility requirements to explain why she is likely not to continue to be eligible.
- Confirmation that sufficient mainstream and community supports are in place. They discuss the role of the health and education systems in providing ongoing support.
- Whether Lin's family would like Lin to voluntarily leave the NDIS.

Version Control

Version	Created by	Status	Date
V0.1	SRP102	New	11/12/2023
V1.0	SRP102	Final	01/02/2024
V2.0	SRP102	Final	01/03/24