

Staff can choose to use this checklist to assist them in planning and supporting the person with Annual Health Assessment. It will help you do the required actions before, during and after the Annual Health Assessment. Medicare will only allow the Doctor to claim for one Annual Health Assessment per year. Check that 365 days have passed since the last Annual Health Assessment before booking the appointment.

For general health appointments, use the [NDIS LWB 5504 Health Appointment - Checklist](#).

Scheduling the Health Appointment			
✓	Action	Further Information	Notes
<input type="checkbox"/>	Talk with the person we support about what an Annual Health Assessment is for and what will happen during the appointment.	Use relevant communication style (as needed)	
<input type="checkbox"/>	Check who is the best person to accompany the person we support	Person we support/team to advise	
<input type="checkbox"/>	Find out the best time of day for the appointment – the Annual Health Assessment will take approximately an hour.	<p>Check the person’s daily/weekly routine. Do not make the appointment for any day or time that the client may find challenging.</p> <p>Check if there are times of the day where there are likely to be a less waiting time.</p> <p>Think about how to manage waiting times best. For example, what activities can you do to keep the person we support from getting bored or tired as they wait for the Doctor?</p> <p>Ask if the receptionist might be able to phone you to say you are next to see the doctor.</p>	

Scheduling the Health Appointment			
<input checked="" type="checkbox"/>	Action	Further Information	Notes
<input type="checkbox"/>	Check if the person needs or wants a family member or supported decision-maker to attend	Identify the person's Supported/Authorised Decision Maker (if they have one)	
<input type="checkbox"/>	If yes, confirm the availability of a Supported/Authorised Decision Maker		
<input type="checkbox"/>	Assist person to make an appointment / make an appointment on behalf of the client. Ensure a long appointment is booked.	Record in Diary, create reminders to relevant staff in Outlook Calendar	
<input type="checkbox"/>	Inform the person we support, the family member, the supported/authorised decision-maker (if relevant) and all Staff of the appointment.		
<input type="checkbox"/>	Write a progress note in CIRTS detailing the steps you have taken. Include the conversations you had with the person to inform them and how they communicated their consent.		

Preparing for the Annual Health Assessment Appointment			
<input checked="" type="checkbox"/>	Action (as relevant)	Further Information	Notes
<input type="checkbox"/>	Check the person's NDIS LWB 5502 Health and Wellbeing Plan is up to date	Check the Health Action Plan for any outstanding Health Actions and ensure they are followed up / completed.	
<input type="checkbox"/>	Complete up to page 13 (blue text) of the Comprehensive Health Assessment Program	Start the CHAP from scratch. Do not amend a previously completed CHAP.	

Preparing for the Annual Health Assessment Appointment			
✓	Action (as relevant)	Further Information	Notes
	(CHAP) with the person we support and staff / their support network who know them well.	The Doctor will review and complete the second half (Green Heading / Page 14 onward). They must provide written direction on the Action Plan page – including confirming that there is no action required.	
<input type="checkbox"/>	Attach a copy of the NDIS LWB 5513 Comprehensive Health Assessment Program – Letter to GP	This explains the origin of the CHAP tool and the fact that Doctor can use their own template if they wish.	
<input type="checkbox"/>	Attach a copy of the NDIS LWB 5515 Annual Health Assessment Appointment – GP Fact Sheet	This explains all requirements LWB has of the Doctor when undertaking an Annual Health Assessment	
<input type="checkbox"/>	Is there any other important information to take? For example, an article about intellectual disability that might help the doctor.		
<input type="checkbox"/>	Complete the NDIS LWB 5521 Nutrition and Swallowing Risk Checklist – no longer than 7 days before the appointment. If questions are answered with Yes or Unsure, the completed checklist must be taken to the Annual Health Assessment for review and action	The Doctor will review and include written directions to each risk identified within Part 3 Summary of Results – Action Decided column.	
<input type="checkbox"/>	Only where a person has no teeth, complete the first section of the NDIS LWB 5514 Oral Health Care Plan	The Doctor will review and include directions for oral health care.	

Preparing for the Annual Health Assessment Appointment			
✓	Action (as relevant)	Further Information	Notes
<input type="checkbox"/>	Identify and gather relevant health support plans to be reviewed including: Epilepsy Management Plan, Diabetes Management Plan, Allergy Response Plan etc.	The Doctor can review any other relevant health plans they are already overseeing. They should be aware of all health support the client is receiving.	
<input type="checkbox"/>	Where a client has teeth, book an appointment with the person's Dentist to undertake the Annual Dental Assessment – to occur 12 monthly at minimum (for people with teeth)	The Dentist will complete directions about how to maintain the person's teeth and provide support with oral hygiene.	
<input type="checkbox"/>	Confirm if Medicare Card or Health Care Card is needed for the appointment	If an appointment is at a new health facility / GP	
<input type="checkbox"/>	Confirm if the appointment will need to be paid for and take cash or ATM card. Medicare items 705 or 707 should cover the appointment.	Confirm when making an appointment.	
<input type="checkbox"/>	Gather the following documents (as relevant) <input type="checkbox"/> Partially completed Comprehensive Health Assessment Program (CHAP) <input type="checkbox"/> Completed 5521 Nutrition and Swallowing Risk Checklist <input type="checkbox"/> Medication Record <input type="checkbox"/> Compact Medication Chart <input type="checkbox"/> LWB Health Support Plan(s)	Also take new Compact Medication Chart if it is due to be re-written.	

Preparing for the Annual Health Assessment Appointment			
✓	Action (as relevant)	Further Information	Notes
	<input type="checkbox"/> Partially completed 5514 Oral Health Care Plan – if client has no teeth <input type="checkbox"/> LWB Health Support Plan(s) templates on USB		

During the Annual Health Assessment Appointment				
✓	Tasks for Health Professional	Further Information	Occurred	Comment (if No was selected)
<input type="checkbox"/>	Complete the General Practitioner section of the Comprehensive Health Assessment Program – (or their equivalent alternative) and provide written actions – including if no actions are required.	Ensure the Actions section has written advice from the GP, their details, signature and the date.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Complete a written entry in the Action Decided column of Part 3 Summary of Results of the Nutrition and Swallowing Risk Checklist for every risk identified – including if no is action required.	Ensure there is a written entry for each risk listed, the GP’s details, signature and the date.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Complete sections 2 and 3 of the Oral Health Care Plan (for people with no teeth only)	Ensure directions for staff are provided.	<input type="checkbox"/> Yes <input type="checkbox"/> No	

During the Annual Health Assessment Appointment				
✓	Tasks for Health Professional	Further Information	Occurred	Comment (if No was selected)
<input type="checkbox"/>	Completes reviews of health-related plans such as Epilepsy Management Plan.	Ensure they update details of any review undertaken, and document amendments to the plan in new templates (provided via USB).	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Provide referrals as required		<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Update Compact Medication Chart and Medication Record if relevant	Ensure Compact Medication Chart and printed copy of Medication Record with previous entries is made available for updating.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Advise whether services of a Clinical Nurse are required		<input type="checkbox"/> Yes <input type="checkbox"/> No	

After the Annual Health Assessment Appointment			
✓	Action (as relevant)	Further Information	Notes
<input type="checkbox"/>	Take new scripts to the pharmacist	Ensures Medications are current	
<input type="checkbox"/>	Obtain new Webster Pak(s) / non-packed medication		
<input type="checkbox"/>	Obtain CMI sheet(s) for new medication(s)	Consumer Medicine Information	
<input type="checkbox"/>	Update review dates of the CHAP, Nutrition Swallowing Risk Checklist, Oral Health Care Plan (if		

After the Annual Health Assessment Appointment			
✓	Action (as relevant)	Further Information	Notes
	reviewed) and any other plans reviewed within the 5502 Health and Wellbeing Plan.		
<input type="checkbox"/>	Update the Health Action Plan within 5502 Health and Wellbeing Plan with any new actions.		
<input type="checkbox"/>	Update the NDIS LWB 5560 Hospital Support – Plan with any relevant health care information.		
<input type="checkbox"/>	Inform Authorised Decision Maker of appointment outcome	If they did not attend appointment	
<input type="checkbox"/>	Inform all staff of appointment outcome and list actions to be taken in Health Action Plan section of the Health and Wellbeing Plan.	Communication Book, Client Progress Notes	
<input type="checkbox"/>	Add agenda items (if required) to next Team Meeting	Discuss important details and actions if necessary	
<input type="checkbox"/>	Schedule appointments with any other Health Professionals or Clinical Nurse referred to		
<input type="checkbox"/>	Upload updated documents to CIRTIS including: <ul style="list-style-type: none"> • completed CHAP, 5521 N&S Risk Checklist, 5514 Oral Health Care Plan, 5502 Health and Wellbeing Plan • new / updated / reviewed Health Support Plans • updated Medication Record 		