

Checklist for programs with eligibility criteria

System

- Develop eligibility criteria that give clear, practical guidance on what will be considered. Aim for criteria that can be objectively verified. Avoid ambiguity.
- Establish a clear application process. Test the process from a user perspective. Allow for the needs of people with limited computer or language skills, the vulnerable and disadvantaged, and those unfamiliar with government processes.
- Assess the information you need to obtain to assess applications – and how to obtain it.
- Avoid inefficiencies by removing obstacles to prudent information exchange with other agencies, and “piggybacking” off existing sources of information such as pensioner cards.
- Establish and communicate an order of priority for processing applications.
- Document your criteria and process in a manual that is accessible, easy to use and up to date.
- Apply control systems, including checks for fraudulent activity.
- Provide for periodic review.

Assessment

- Provide assessment officers with the training, guidance and support to properly assess applications.
- Allow assessment officers the flexibility to make allowances for human error, and to support people who are vulnerable and disadvantaged.
- Establish assessment timeframes and a monitoring system. Confront and resolve applications that are delayed.
- Accept information in different formats - focus on getting the required information.
- Ensure customer service centre officers understand your program, and have the ability to deal meaningfully with enquiries.

Communication

- Clear communication is vital. Use clear, plain, jargon free language.
- Use your agency website to provide:
 - information about criteria, processes and time limits
 - access to the application form or an online application process
 - helpful tools, such as checklists of supporting information
- regular updates, including progress reports for schemes subject to funding limits or quotas
- Be prepared to communicate with individual applicants in a variety of ways, including email and SMS. Maintain good records of your communication.
- Record your assessment decisions in writing. Include reasons, follow up contact information, and review options.

Complaints and reviews

- Establish processes to deal with complaints and review decisions.
- Ensure these processes are publicised and visible through your website and email.
- Use feedback from complaints and review to identify and address problems.