

GUIDE TO ELIGIBILITY POLICY TEMPLATE

ABOUT THIS POLICY AREA

This policy guides the criteria and processes the organisation uses to decide who is eligible to use its services.

A written eligibility policy is required as part of meeting Standard 1 (Accessibility of services).

Standard 1 – eligibility

The organisation develops, implements and reviews policies and procedures (consistent with the service agreement) that deal with eligibility, including a clear statement of the criteria the organisation uses to decide who is eligible.

Policy checklist

The following checklist will help you check that an existing policy covers this area adequately.

The policy should:

- describe your eligibility criteria
- describe any categories of exclusion from your services
- explain how eligibility criteria are reviewed, including comparing records of service use with the demographic profile of the agreed target group
- outline how your organisation will manage disputes in situations where a person has been refused a service based on ineligibility
- contain clear procedures and actions
- indicate the timing of any actions
- show when it was approved
- show when it was last reviewed.

COMPLETING YOUR ELIGIBILITY POLICY

Using the policy template

The template provides some example statements. You can adapt these statements and include them in your policy or write your own statements to better suit the operations and services of your organisation.

To customise the policy template, click on the shaded sections <<Insert text>> and insert the information that is specific to your organisation.

When you have completed the policy template, delete the shaded instruction sections such as: [Refer to the eligibility policy template guide for questions and/or examples to consider when customising this section.](#)

For further information on using the policy guides, refer to the information in *Using the policy templates and guides*.

Guidelines for each section of your policy

1. Purpose

When identify the purpose of the policy, consider how it might apply to your client group/s and other agencies you work with. Do you need to make specific statements to ensure you are inclusive of particular groups, such as Aboriginal and Torres Strait Islander peoples, Australian South Sea Islanders, people from culturally and linguistically diverse backgrounds, and people with a disability?

2. Scope

To determine the scope of the policy, consider the following questions:

- Does this policy apply to all your organisation's services, and to all clients?
- Are there different eligibility criteria for different services you provide or for different client groups?
- Which staff will be involved in assessing eligibility?

3. Policy statement

If you are adopting the policy statement in the template, consider whether there are any additional commitments that your organisation wants to make.

In identifying the actions your organisation will take to implement this policy, you should include the following:

- fair and consistent practices in determining who is eligible for services
- fair and consistent practices in managing situations where a person is ineligible for a service.

4. Procedures

The procedures describe how your organisation achieves the aims and goals you have outlined in your purpose, scope and policy statement.

4.1 Eligibility criteria

Define your eligibility criteria. If there are different criteria for different activities and services, make this clear. Eligibility criteria should be inclusive of the broadest possible group of people who could use your service.

Document your review process for your eligibility criteria. This should include regular comparison of your client usage figures with the demographic profile of your agreed target group (this will be described in your access policy).

4.2 When someone is not eligible for a service

List the criteria for determining which clients or types of clients are ineligible or otherwise specifically excluded from your service and, where relevant, how these have been negotiated with the funding department. Explain the right of ineligible clients to appeal the decision and be referred to other more appropriate services.

5. Other related policies and documents

List the other policies related to the access policy. This may include:

- access policy
- service requests and referrals policy.

Also list the forms and other organisational documents related to your eligibility policy.

6. Review processes

Consider how often the policy should be reviewed and the process for doing this:

- **frequency of review:** Most policies benefit from an annual review. The experience of implementing the policy is used to decide which changes are necessary. Consider reviewing your eligibility policy as part of an annual review of the organisation's policies. If your organisation is small, you may consider reviewing your policies over a three-year period. Critical incidents may prompt you to review the policy ahead of schedule.
- **responsibility for the review:** In most organisations, the person accountable for client service would be responsible for reviewing this policy. In small organisations, this may be the manager or service coordinator. In larger organisations, this may be a client service manager.
- **process for the review:** Decide which particular staff, volunteers, external people and organisations will provide input to the policy review, and whether clients will be involved.
- **decision-making process:** Who will review draft changes to the policy, and who will approve changes? What will be the timeframe for the review process?
- **documentation and communication:** What records of the policy review process are needed? How will changes to the policy be communicated to staff implementing the policy? In a small organisation, this may be as simple as noting the changes at a staff meeting. In a larger organisation, an email memo may be needed.
- **key questions for the review:** Is the policy being implemented? Are procedures being followed? Is the policy clear? What has changed that may prompt a change to the policy? Have particular stakeholders had difficulty with any aspect of the policy? Can their concerns be resolved? How does the policy compare with that of similar organisations?