

Before the assessment

Use the assessor's instructions for your appointment. These prompts help you organise questions; they are not an assessment or a compulsory document list.

Participant / preferred name:

Assessor / organisation / contact:

Purpose of this assessment, confirmed with the assessor:

Date, location or call link / expected length:

What the appointment and report will include:

Costs, payment arrangements and cancellation terms clarified:

Who the participant wants involved, and how:

Communication preferences, interpreter or access arrangements to discuss:

Breaks, timing or other appointment arrangements agreed:

Existing documents the assessor has specifically requested:

How to send those documents / who has agreed to help:

Everyday examples the participant wants to discuss:

Questions still unanswered before the appointment:

Report timing, recipients and factual-correction process to ask about:

Optional coordination tool. Not an NDIA form, clinical instruction or funding approval.

Store completed copies appropriately and share only with the people who need them.

Full guide and official sources: <https://www.kinovo.com.au/resources/functional-capacity-assessment-preparation>

An accurate everyday example

Describe what actually happens, including the support already in place and variation over time. Do not remove usual support or attempt something unsafe to complete this sheet.

Everyday activity or situation:

What the participant wants to do, in their words:

Where and when this example happened:

Who is describing it: participant / supporter / existing record

What the participant does independently:

Prompting, assistance, equipment or adaptations already used:

Who provides that support and how often:

What remains difficult even with the current support:

What varies between occasions, and how often that variation occurs:

Time, effort or recovery afterwards, if relevant and known:

Participant's own view of what helps or gets in the way:

What is directly observed and what is reported by someone else:

What we are unsure about or want to explain to the assessor:

Relevant existing document or note, if there is one:

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Documents and questions to follow up

Use one card for each requested document or unanswered question. Confirm that an item is needed before spending time or money obtaining it.

Requested document or question:

Why the assessor needs it / who confirmed this:

Existing document title, author and date, if available:

Person or service holding the document / able to answer:

Person who has accepted the follow-up:

Participant's sharing agreement / any authority to clarify:

How the information should be sent:

Agreed needed-by date, if any:

Next check-in date:

Status: to clarify / requested / received / sent / not needed

Receipt or reply confirmed by / on:

If it will not arrive in time, assessor's advice about the appointment:

Question to raise during or after the assessment:

Answer received / further action and accepted owner:

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