

Assistive technology request summary

Start with the person's activity and need. Leave clinical recommendations to the appropriate adviser or assessor.

Participant / preferred name:

Prepared with the participant on:

Everyday activity they want support with:

What is difficult now, in the participant's words:

Existing equipment or strategies and what is / is not working:

Item or options being explored (not a purchase decision):

Relevant adviser / assessor and contact:

Cost category and risk advice confirmed by / on:

Current guidance or written advice used:

Evidence / quote / trial needed for this item, or not applicable:

Who will clarify the funding and purchase pathway:

Any actual deadline and where it came from:

Information the participant agrees to share, with whom and why:

One next step, accepted owner and next check-in date:

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/ndis-assistive-technology-request-checklist>

Assessment, quote or next-step tracker

Use one card for each document or action that is actually needed. Mark irrelevant steps 'not applicable' with the reason.

Item / request reference:

Document or action needed, and why:

Status: to clarify / requested / received / correction needed / complete / not applicable

Owner and date they accepted:

Person or organisation asked to respond:

Date requested:

Agreed due date, if any:

Next follow-up date:

Current filename, author, date and version:

Missing information or question:

Submitted to / date / receipt, only if submission is required:

Written outcome, conditions and date, if applicable:

Purchase or rental pathway confirmed by / on:

Delivery, setup, training or review still to arrange:

Reminder: a quote, report or submission receipt is not funding approval.

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/ndis-assistive-technology-request-checklist>

Request or follow up missing information

Choose the adviser, supplier or coordinator who can answer this question. Send a specific request rather than the whole file history.

Subject: [Item / request reference] - clarification of [specific point]

Hi [name],

With [participant's] agreement, I am helping organise [request].

The activity they want support with is [brief context].

We currently have [document title, author and date].

The question we still need answered is [one specific question].

Could you [confirm the pathway / clarify the recommendation / update the quote]?

The relevant attachment or current document is [location].

If this is outside your role, please tell us who should address it.

Can you let us know an expected response date?

Our next agreed check-in is [date]. This is not an NDIA decision deadline.

For a follow-up: We requested [item] on [date]. Has the expected timing changed?

We will keep this step open until the answer is confirmed.

Thank you, [name and contact details]

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/ndis-assistive-technology-request-checklist>