

Assignment of Benefit (AoB) Changes Practice Readiness Checklist

How to Use This Checklist

Start by setting up your practices AoB Quality Improvement (QI) team and nominating a lead person to coordinate activities. Use the checklist and timeline to plan your approach, assign responsibilities and track progress.

Schedule regular team meetings to review progress, discuss challenges and record meeting minutes. These activities can support your accreditation evidence, including:

- **QI 1.1 Quality Improvement Activities**
- **C3.1 Practice Team Meetings**
- **C3.2 Staff Education and Training**

Establish your timeline for each section before commencing with the plan. Full implementation of the new AoB requirements begins on 1 July 2027. To ensure a smooth transition, practices are encouraged to commence their new processes at least six weeks before the official go-live date, allowing time to identify and resolve any issues.

If you need support with Quality Improvement (QI) activities, our Primary Care Engagement Officers can provide guidance and practical assistance, that includes

- helping your practice identify improvement opportunities
- using the Model for Improvement and Plan-Do-Study-Act (PDSA) cycles
- developing and testing changes
- embedding sustainable QI processes.

Additional resources, templates and tools are available in the Quality Improvement Toolkit to support your practice throughout the improvement journey.

Practice Name: _____

Practice Assignment of Benefit
Quality Improvement Team:

Practice Lead: _____

Members: _____

Meeting dates:

Meeting 1:	Meeting 2:
Meeting 3:	Meeting 4:
Meeting 5:	Meeting 6:
Meeting 7:	Meeting 8:
Meeting 9:	Meeting 10:
Meeting 11:	Meeting 12:

Progress Tracker

Goal: Ensure your practice is fully prepared by 1 July 2027 for a seamless transition to the new Assignment of Benefit requirements.

Activity	Status			Due Date	Owner
	Not Started	In Progress	Complete		
Nominate AoB Lead					
Software Review					
Workflow Updates					
Staff Training					
Patient Communications					
Enduring Assignment Process					
Final Readiness Review					

Phase 1: Understand the Changes

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Governance and Planning

- ☐ Nominate an AoB implementation lead.
- ☐ Review the new AoB requirements and transition arrangements.
 - Assignment of benefit for bulk bill claims – Health professionals – Services Australia
 - RACGP – Changes to the assignment of benefit process
 - Improving the assignment of benefit process | Australian Government Department of Health, Disability and Ageing
- ☐ Identify current billing and consent processes.
- ☐ Discuss impacts with practice owners, managers and key staff.
- ☐ Create a practice implementation plan.

Software and Systems

- ☐ Contact your software vendor regarding AoB functionality.
- ☐ Confirm electronic consent options available within your software.
- ☐ Understand how enduring assignments will be managed.
- ☐ If using Tyro, check how AoB can be managed through their software.
- ☐ Confirm record retention capabilities.

Notes:

Phase 2: Design New Processes

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Practice Workflows

- ☐ Review patient consent workflows.
- ☐ Update bulk billing procedures.
- ☐ Develop processes for:
 - Pre-assignment
 - Post-assignment
 - Verbal assignment (transition period, will need to be phased out by 30 June 2027)
 - Enduring assignment (keep in mind that these agreements will be valid for 12 months until 30 June 2027, further information to be provided by the department)
- ☐ Develop procedures for storing AoB records for a minimum of two years.

Patient Communication

- ☐ Update website and patient information sheets.
- ☐ Prepare reception and administration scripts.
- ☐ Develop communication for eligible patients regarding enduring assignments.

Notes:

Phase 3: Implementation and Staff Training (/ / 2027)

Staff Readiness

- ☐ Train reception staff.
- ☐ Train practice managers.
- ☐ Train clinicians.
- ☐ Ensure staff understand:
 - Patient consent requirements
 - Who can act as a responsible person
 - Enduring assignment requirements
 - Record-keeping obligations
- ☐ Remove outdated references to “patient unable to sign”.

System Testing

- ☐ Test electronic consent workflows.
- ☐ Test document storage and retrieval processes.
- ☐ Confirm all templates and forms are working correctly.

Notes:

Phase 4: Final Readiness

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Compliance Check

- ☐ Conduct an internal readiness review.
- ☐ Check all staff have completed training.
- ☐ Confirm software updates have been implemented.
- ☐ Review patient communication materials.
- ☐ Test audit and record retention processes.
- ☐ Address any outstanding issues before 30 June 2027.

Notes:

Go-Live Readiness Checklist

by 1 July 2027

- ☐ Practice workflows updated.
- ☐ Staff trained and confident.
- ☐ Software configured and tested.
- ☐ Consent processes documented.
- ☐ Patient information available.
- ☐ Enduring assignment process established (if applicable).
- ☐ Record-keeping processes compliant.
- ☐ Practice ready for full AoB implementation.

Final Review: