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Managing deferred cases

When a Medical Officer of the Commonwealth (MOC) is considering a client's health examination results, they may decide that they require additional information before they can provide their opinion on whether the applicant meets the health requirement. In this case, they will "defer" their opinion and request additional information/examinations to be completed. The process followed for deferred cases is explained below.

Note: in certain cases the eMedical system will also generate additional examinations that need to be completed based on health results recorded by **panel clinics** – that is, before the case even reaches a MOC.

What happens if Bupa Medical Visa Services decide that additional information is required?

As outlined in the flow chart at **Appendix A**, where additional information is required in order for a MOC to provide their opinion, a Bupa MOC will formally defer the case in the Health Assessment Portal (HAP). During this time, HAP and CSP will indicate that the case is deferred.

Where the client has provided an email address to the examining clinic at the time of the client's Immigration Medical Examination (IME), the formal 884 letter outlining the deferred opinion and the required additional health examinations will be automatically generated and emailed directly to the client. If the visa processing Post is indicated in HAP, the Post email will be included (for visibility) as a Cc: recipient. The 884 will also be available in PDF form in TRIM. You can find this 884 letter by searching in TRIM using the HAP ID, or finding the relevant BCC container reference number in HAP. Where the client has NOT provided an email address at the time of IME, the relevant Post or Bupa will be required to communicate with the client, per processes outline below.

Note: ICSE will continue to display the Health Requirement Event as 'Outstanding' where a case has been deferred because health processing is not complete and you cannot yet finalise the client's visa application.

Please note that where the client has NOT provided an email address at the time of IME:

- a. For cases being processed offshore :
 - i. a copy of the 884 will be emailed to the relevant post (where indicated in HAP) mailbox; and
 - ii. posts are required to notify the client of the deferral. A letter template for this purpose is available at **(Appendix B)**
- b. For cases being processed onshore :
 - i. **Bupa will communicate** with the client regarding the deferral opinion and update HAP with a 'note' to advise that the correspondence has been sent so that the officer has visibility of this. (**Note:** Bupa only have access to client contact details as available in CSP. If Bupa cannot access client contact details via CSP, they will liaise with s. 47E(d) in an effort to obtain this information).

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Bupa will formally write to the relevant client, giving them 28 days to provide the additional information (subject to exceptions for tuberculosis (TB) related cases explained below), or client is to contact Bupa explaining any issues in providing this information within the required timeframes.

The table below explains what action Bupa will take depending on contact from the client:

If...	Action to be taken
Additional health information received	Provide a final MOC opinion or a further deferral if required
Client contacts Bupa indicating that they will be unable to obtain the required information within 49* days.	Bupa will update health case in HAP with relevant case notes so that the case officer has visibility of any legitimate delays.
No contact received from client within 49 days* after the letter was sent	Bupa will record a <u>Health Not Completed</u> outcome in HAP with the reason that the MOC requested health examinations were not provided.

*The 28-day period given to respond, plus 21 days provided for the client to actually receive the letter.

What if the client sends the additional medical information to me instead of Bupa?

Officers should record the examination(s) as received into the HAP portal, attach any documentation to the health case and send it onshore for processing.

Instructions can be found in the health processing guideline HAP: *Processing paper health examinations in HAP* on the [Bordnet](#)

Alternatively, please forward the information to **Bupa** by email to s. 47E(d) and provide the HAP ID for the client in the subject line.

What if my client has received a 'Health Not Completed' outcome because they did not provide the required information?

In this scenario, the officer should consider proceeding to visa refusal first following the steps/considering the information provided in the Sch4/4005-4007 – The Health Requirement Procedural Instruction (i.e. issuing a reminder letter, and following the natural justice process).

What if my client is legitimately unable to provide the required information within the required period?

It may be difficult for the client to be able to provide all the required information within a 49 day* period (for example, if a specialist report is required, there may be a significant wait period before the client can be seen and the report finalised). Consequently, Bupa will provide the client with an extension where considered legitimate and update the HAP with relevant case notes accordingly.

*That is, the 28 day period given to respond, plus 21 days provided for the client to actually receive the letter.

Note: onshore clients who receive a MOC deferred opinion as per one of the below codes, will already have been referred to a State or Territory chest clinic for follow up. There can be long waiting periods for an initial

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appointment with these clinics and further appointments may be required to either rule out active TB or finalise treatment:

- 603 – Chest Clinic investigation on current status of TB
- 604 – Chest Clinic investigation about radiological abnormality
- 606 – Initial TB investigation
- 607 – Continued Anti-TB treatment
- 608 – Await TB culture results
- 610 – Pulmonologist Report

If you have concerns about the time that has elapsed since the deferral opinion was provided, please check the notes in the HAP for advice and then contact Bupa via the agreed contact channels if required. The agreed communication protocols can be located at: <https://intranet.bcz.gov.au/border-ops/processing/visa/health/migration-medical-services-provider-communication-protocols>

There is no need to contact State or Territory chest clinics to verify the clients' progress through this process. Unnecessary contact by officers or applicants increases the workload for chest clinics and delays their ability to finalise referrals to them.

What if my client provides the information requested after a 'Health Not Completed' outcome is recorded but before a refusal decision has been made?

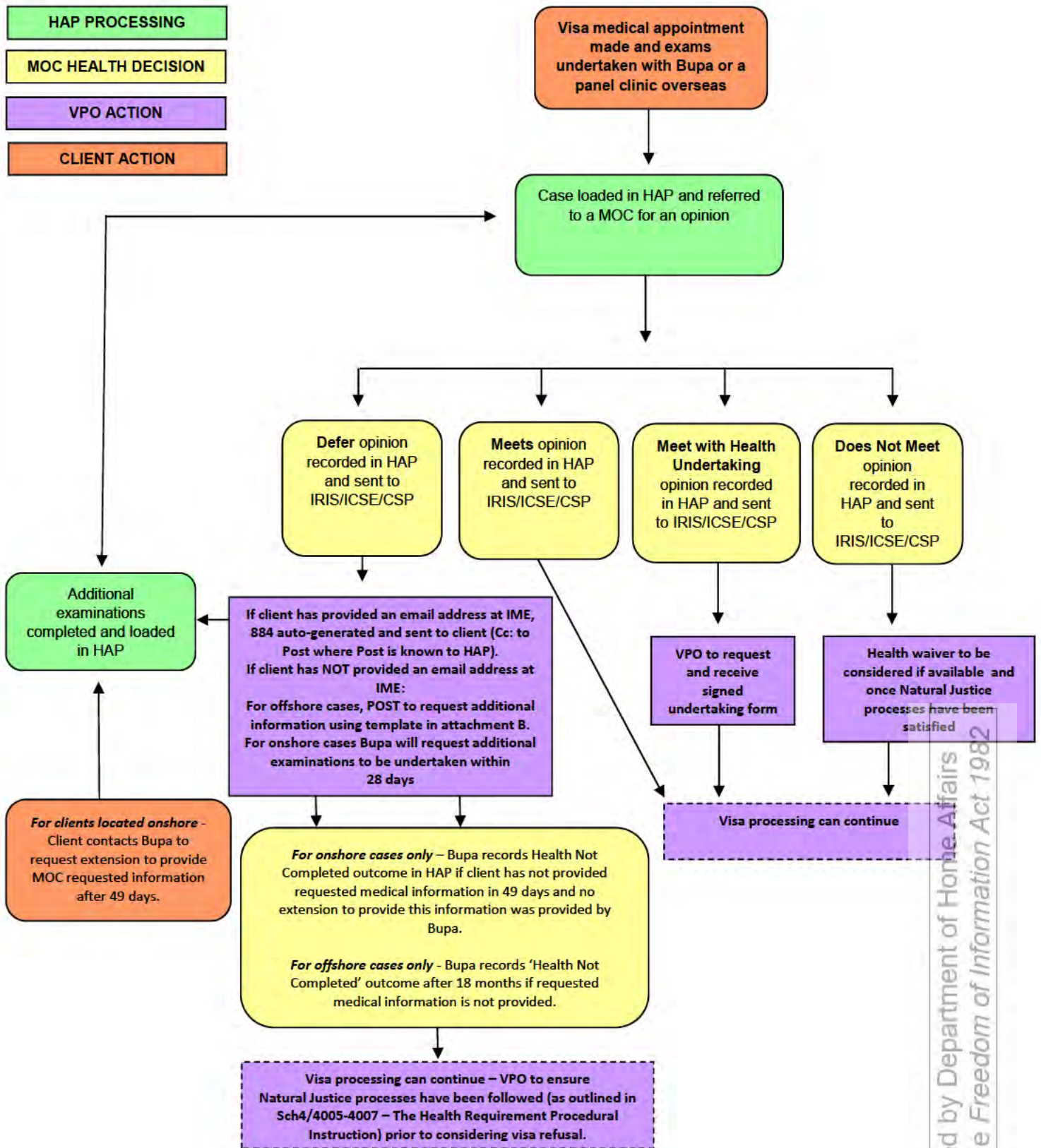
Officers should contact s. 47E(d) to create a New Assessment in HAP. This will then allow you to:

- record any examination(s) as received into the HAP portal, attach any documentation to the health case that has been provided to you and send it onshore for processing.
- request the client to undertake the examinations at the panel clinic.

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Appendix A: Standard deferral process



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Appendix A: Standard deferral process (text based process map)

Visa medical appointment made and exams undertaken with Bupa or a panel clinic overseas.			
Case loaded in HAP and referred to a MOC for an opinion			
Can MOC provide a final assessment			
If Yes		If No	
Meets opinion	Meets with health undertaking	Defer Opinion	
Meets opinion recorded in HAP and sent to IRIS/ICSE/CSP.	Meet with Health Undertaking opinion recorded in HAP and sent to IRIS/ICSE/CSP.	<ul style="list-style-type: none"> If client has provided an email address at IME, 884 auto-generated and sent to client (Cc: to Post where Post is known to HAP). If client has NOT provided an email address at IME: <ul style="list-style-type: none"> For offshore cases, POST to request additional information using template in attachment B. For onshore cases, Bupa will request additional examinations to be undertaken within 28 days. Note: For clients located onshore - Client contacts Bupa to request extension to provide MOC requested information after 49 days. 	
Visa processing can continue.	VPO to request and receive signed undertaking form.	Additional examinations completed and loaded in HAP.	Additional examinations not completed.
	Visa processing can continue.	MOC provides one of the final assessments given below: <ul style="list-style-type: none"> Meets opinion. Meets with health undertaking opinion (VPO to request and receive signed undertaking form). Does not meet opinion (Health waiver to be considered if available and natural justice processes are satisfied). 	<ul style="list-style-type: none"> For onshore cases only – Bupa records Health Not Completed outcome in HAP if client has not provided requested medical information in 49 days and no extension to provide this information was provided by Bupa. For offshore cases only - Bupa records 'Health Not Completed'

(Continued on next page)

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(Continued from previous page) Appendix A: Standard deferral process (text based process map)

Visa medical appointment made and exams undertaken with Bupa or a panel clinic overseas.			
Case loaded in HAP and referred to a MOC for an opinion			
Can MOC provide a final assessment			
If Yes		If No	
Meets opinion	Meets with health undertaking	Defer Opinion	
		Additional examinations completed and loaded in HAP.	Additional examinations not completed:
		<ul style="list-style-type: none"> • Visa processing can continue. 	<ul style="list-style-type: none"> • outcome after 18 months if requested medical information is not provided. • Visa processing can continue – VPO to ensure Natural Justice processes have been followed (as outlined in Sch4/4005-4007 – The Health Requirement Procedural instruction) prior to considering visa refusal.

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OFFICIAL**Appendix B: Letter Template (Offshore Case ONLY)**

<Date>
 <Client Title> <Given_Name> <Family_name>
 <Client Address details>

ADVICE ABOUT YOUR AUSTRALIAN IMMIGRATION HEALTH EXAMINATIONS

HAP Id.: <Health_Case_Id>
Birth Date: <Birth_Day> <Birth_Month> <Birth_Year>

Dear <Client Title> <Family_name>

I refer to the health examinations that you have undertaken in connection with your visa application to Australia.

What is the current status of my health examination results?

A Medical Officer of the Commonwealth (MOC) has considered your health examination reports and advised that further medical information is required before an opinion can be provided on whether you meet the health requirement for your visa. It is therefore necessary for you to undergo further health examination(s).

What additional information is required?

The additional medical information required is outlined below:

<Insert Examination details >

These new requirements have already been loaded into your online file in eMedical.

What do I need to do next?

You need to contact a panel clinic to arrange an appointment to discuss the additional information requested and undergo any additional health examinations required. Please take this letter with you when you visit the clinic. You will also need to provide your passport (or approved alternative identity documentation) to the clinic for identification purposes.

If it is not possible for you to attend the original panel clinic, an alternative eMedical enabled panel clinic may be approached for this follow-up request.

The panel clinic which you attend will enter and submit the additional information into eMedical against your record. If the clinic is not eMedical enabled, the paper record will be sent to the Migration Medical Services Provider

When does this information need to be provided?

This information must be supplied by <date required>.

However, we would encourage you to provide this information as soon as possible to facilitate processing of your visa application.

Please note: some testing and treatment, including for Tuberculosis, may take longer than 90 days. You may also find it difficult to book an appointment within 28 days with some specialists. **In this situation, please contact your visa officer as soon as possible so that you can be provided with an extension if required and considered appropriate.**

Please be aware that it is responsibility of the visa applicant to meet all expenses incurred in connection to the request for additional health examinations, as part of the visa application process.

Yours sincerely
 <officer name>
 Department of Immigration and Border Protection

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HAP - Health Assessment processes

This tip sheet is designed to assist visa processing officers (VPO) with the system processes that are involved in viewing and understanding the progression of a health case. It will also explain other functions that are available in HAP - Health Assessment to visa officers after the applicant has completed their health.

There are also a number of other tip sheets regarding health related processes available on the intranet at: <https://intranet.bcz.gov.au/border-ops/processing/visa/health/processing-guidelines-visa-officers>

Migration Medical Services Provider (MMSP) Communication protocols

Our MMSP is Bupa Medical Visa Services (Bupa). If you require assistance to progress an assessment of a health case, please use the agreed communication protocols noted on the intranet.

<https://intranet.bcz.gov.au/border-ops/processing/visa/health/migration-medical-services-provider-communication-protocols>

CSP Merge

Note: If you are required to complete a client merge, instructions are available via the below TRIM links. If you require an urgent merge, please ensure you set the priority accordingly.

- ADD2015/382336 - Requesting a client merge using the Client Search Portal (CSP)
- ADD2015/382356 - Requesting a client merge using the Client Search Portal (CSP), if PIDs already merged in TRIPS

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Glossary

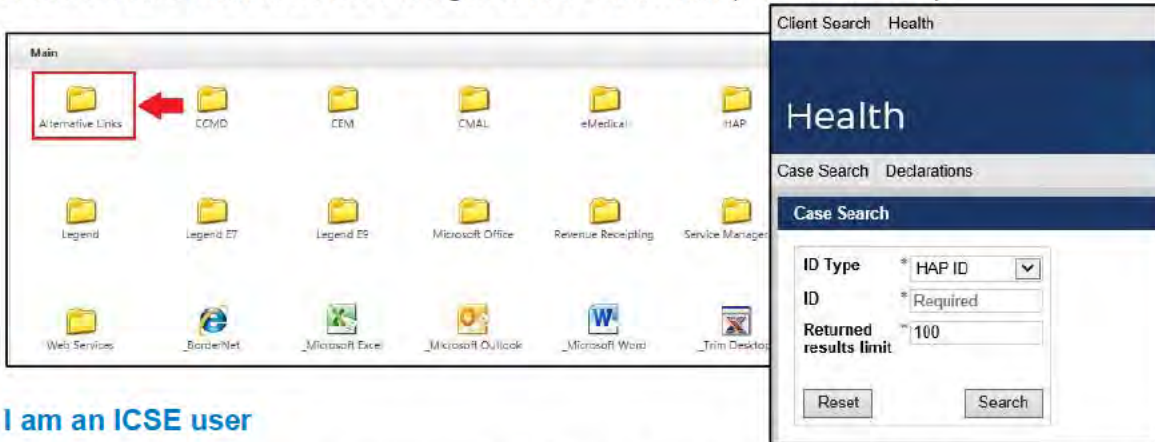
Term	Acronym (if applicable)	Definition
Department of Home Affairs	Home Affairs	A department of the Government of Australia that is responsible for immigration, citizenship and border control.
Does not meet	DNM	The applicant has not met the health requirement and a visa cannot be granted unless a health waiver is available and exercised.
Health Assessment Portal	HAP	A departmental system that allows officers to record applicant health declaration data, determine what immigration medical examinations applicants are required to undertake, and generate health identifiers and documentation.
Health Care Worker/Student	HCW/HCS	An applicant intending to work as, or study to be, a doctor, dentist, and nurse or ambulance paramedic in a health care environment.
Integrated Client Services Environment	ICSE	A departmental visa processing system that provides support for the processing and evidencing of citizenship applications as well as other onshore visa processing tasks.
Immigration Records Information System	IRIS	A departmental visa processing system used primarily to support the processing of visa applications offshore. Used to be the primary offshore visa processing system.
Immigration Medical Examinations	IME	The medical examinations required to determine whether a visa applicant satisfies the health requirement.
Medical Officer of the Commonwealth	MOC	Registered medical practitioner appointed by the Department of Home Affairs . They may work directly for the Department, or be employed by the Migration Medical Services Provider.
Migration Medical Services Provider	MMSP	The Department's contracted onshore MMSP. The current provider is Bupa Medical Visa Services (Bupa).
State and Territory Health Clinic	STHC	The designated authority within that state or territory that deals with the comprehensive investigation, management, treatment and reporting of a specific health condition.

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How do I access HAP - Health Assessments?

I am an IRIS/CITRIX user

Offshore IRIS/CITRIX users need to logon to HAP via CITRIX (Alternative Links).

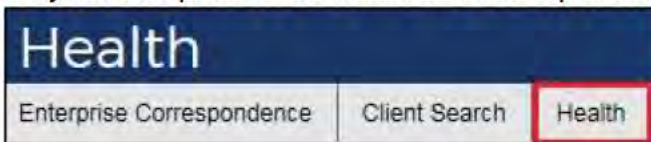


I am an ICSE user

VPOs need to select **Health Assessment** under Quick links on the intranet home page. You can manage your preferences by selecting "Manage" to display the most used portals. Alternatively, if this does not appear you should select **Client Search**.



They can then press on the Health tab at the top of the portal screen.



The HAP - Health Assessment can also be accessed by selecting the blue hyperlink [HAP](#) when a HAP ID is associated to a visa applicant on their visa application in ICSE.

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How do I search for a health case

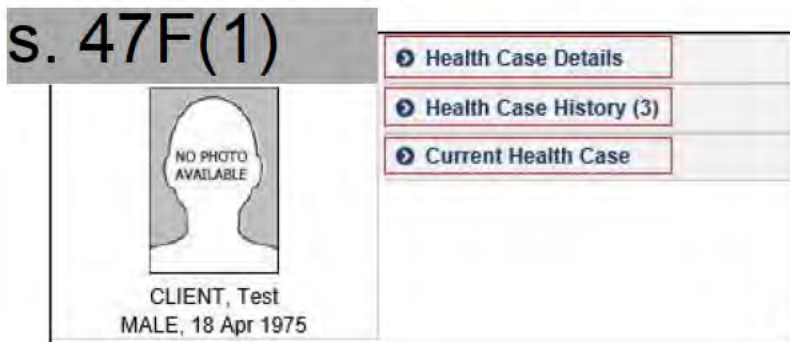
1. Open the **Case Search** screen in HAP
2. Select ID Type, the relevant IDs are **HAP ID**, **Visa Request ID** or **TRN** and type in the unique identifier
3. Press **Search**.



The case you are looking for will appear with the Current Health Case open by default.

I have found the case but I don't know what I am looking for?

The panel on the left of the page contains summary information, which will assist you to understand the current status of the health case. You can use the “twisty” (these are arrows) to expand the screen to see more details of the health case.



See below for further details.

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Health Case Details

This section displays important information in relation to the health case and its creation.

Health Case Details

Client Personal Details

Title -
 Family Name TEST
 Given Name/s CLIENT
 Sex FEMALE
 Date of Birth 28 Nov 1991
 Preferred language -
 Interpreter required -
 Advised departure -

s. 47F(1)

Health Case Details

Source system eVisa
 Case Created 19 Jul 2017
 Batch number -
 Process Type Electronic
 Priority Normal
 Health case type Offshore
 TB risk Level Higher

Information regarding the health case creation, including the TB risk level used to calculate health requirements

Visa Details

Processing Centre -
 Subclass/type 485 - Temporary Graduate
 Stream 34 - Post-Study Work
 Assessment Period 4 years
 Visa status -
 Intended length of Stay 48 month(s)
 Cumulative stay in Australia 597 day(s)

The visa subclass/type associated to the health case, intended period of stay and calculated cumulative stay

s. 47F(1)

System Links

TRIM Communications [BCC2017/2571679](#)
 TRIM - Paper medicals box -
 TRIM - Film x-rays box -
 Movement History [Portal Link](#)
 CMAL [Portal Link](#)

System links associated to the health case, the TRIM BCC file hyperlink contains HAP system generated correspondence

Health Case History (3)

Health Case History

This section will display any health cases that are related to the client. You can click on the HAP ID hyperlink to take you directly to that health case.

Health Case History (3)

HAP ID	Assessed	Expires	Actioned By	Outcome	Subclass	View
s. 47F(1)	-	-	-	-	417	Q
-	-	-	HAPLOAD	-	600	Q
-	-	-	ladmin Four	Does Not Meet	457	Q

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Current Health Case

This section displays important information in relation to the examinations, attachments and assessment of the visa applicant's health case.

Current Health Case

Client Checks

Is this Health Case linked to a Visa application?	Yes	This examination section displays details of the examinations undertaken by the visa applicant. You can also view the information recorded for this exam by clicking on the magnifying glass
Does the client have a previous Does Not Meet opinion?	Yes	
Does the client have Identity concerns?	No	

Examinations

Examinations	Status	Exam. Date	Service Provider	Grade	Source	Re-used from	View
Chest X-ray Examination	Expired	12 Feb 2015	Mr Radiologist TESTING Central Health Testing Clinic	-	eMedical	-	Q

Current Assessment

s. 47F(1)	Assessed	Expires	Actioned By	Centre	Outcome	View
	12 Feb 2015	12 FEB 2016	HAPLOAD	Australian Service Provider	ACLR(4005)	Q

Previous Assessment

This section displays the current assessment outcome and any previous assessments

No Previous Health Assessments

Assess ID	Assessed	Expires	Actioned By	Centre	Outcome	View

Attachments

This section displays attachments that are associated to this health case

Filename	View	Result	Delivery	Arrived	Details	Associated exam	Date Attached
Glasgov0192.dcm	View	Uploaded		Yes		502 - Chest X-ray Examination	12 Feb 2015


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Health Summary Panel

The side panel of a health case in the HAP is the best place to start as this displays comprehensive details of the health case. See below for an explanation of the different fields displayed in this panel.

<p>s. 47F(1)</p>  <p>TEST, Client MALE, 01 Jan 1980</p>	<p>The applicant's health case or HAP ID appears at the top of the side panel.</p> <p>For eMedical cases, the digital photo taken by the panel clinic will appear, with the applicant's bio-data below the photograph.</p>
<p>IME Summary</p> <p>Status Finalised</p> <p>Clearance expires 12 Sep 2018</p>	<p>The IME Summary will provide an overview of the status of the health case (e.g. outstanding or finalised). If the case is in progress, then the next step and who is required to action will display.</p> <p>If the status is finalised, the clearance expiry date will also display.</p>
<p>Health Alerts</p> <p>Identity concern raised ●●●</p> <p>Previous DNM ●●●</p>	<p>The Health Alerts field will only appear if there any identity concerns has been raised by the panel clinic and/or if there a previous DNM opinion for this visa applicant.</p>
<p>Type</p> <p>417 - WORKING HOLIDAY Assessment Temporary (1 yr)</p>	<p>The Type field will display the visa subclass and the clearance type (Permanent or temporary). The assessment period will also be displayed for a temporary clearance.</p>
<p>Assessment Status</p> <p>Meets 12 Sep 2017</p>	<p>The Assessment Status field will display the status of the health case and when the assessment was finalised (i.e. in this case a 'Meets' outcome was given on the 12 Sep 2017). <i>Note: see below for a full list of status terms used in HAP</i></p>

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Can you explain the terms used in HAP – Health Assessments?

Value	Meaning
Assessment Status	
New	This is the default setting for this field. It essentially means that there is no indication that medicals have been started and/or been received for this applicant.
Pre Exam	An eMedical clinic has searched for and managed this applicant's health case. It is now in their inbox for processing.
Exams in Progress	An eMedical clinic has completed the preliminary administrative steps within eMedical for the applicant's health case (e.g. uploaded photo and checked identity) and has now started to process at least one exam for the applicant (e.g. Chest X-ray).
Auto Clear Denied	Health case has already been completed and submitted, but the case has failed auto clearance rules in HAP – Health Assessments. These cases can be processed by MMSP administrative staff or will be referred to a MOC.
On hold admin	A MMSP health-processing officer has put this case on hold.
Sent to MOC	Case has been referred to a MOC for an assessment.
On hold MOC	This case has been put on hold by a MOC.
Awaiting application	For cases, which have been front-end, loaded, a MOC will not proceed to make an opinion as to whether or not the person meets the health requirement until a valid visa application is lodged.
Application Received	An application has subsequently been lodged and linked to the health case previously "Awaiting Application" and contains 'Paper' exams and awaiting MMSP health processing officer action.
Awaiting Assessment	A health case has a paper component and examinations are being re-used, the MMSP health processing officers will retrieve the paper files and complete the assessment.
Not required	HAP has determined that no health examinations are required for the applicant - given their circumstances/declarations at the time.
Sent for Processing Onshore	An offshore user (e.g. VPO at Post), has indicated that the case is not eligible for 'local clearance' and as such, has been "Sent for health processing onshore", to be assessed by a MOC.
Defer	More information, such as a specialist report or further tests, is needed before the MOC can provide an opinion.
SMOC Review	A MOC has provided a Does not Meet Opinion and the case is now with a Senior MOC (SMOC) for review.
Does Not Meet	The applicant has not met the health requirement and a visa cannot be granted unless a health waiver is available and exercised.
Return to MOC	A Senior MOC has sent a Does Not Meet opinion back to the MOC to re-consider.
Compactus Defer or Compactus	This case has been deferred and paper examinations have been filed in the compactus, pending receipt of additional medical information.
Auto Cleared	The health case has passed auto clearance rules and has automatically been finalised.
Recommend Cleared	The MMSP health processing staff have not identified any health concerns, and recommend the health case be cleared.
Locally Cleared	A VPO has made a decision that the applicant meets the health requirement in line with Local Clearance guidelines
Deferred	More information, such as a specialist report or further tests, is needed before the MOC can provide an opinion.

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Value	Meaning
Referred to Clinic	Onshore health cases Deferred for additional 600 series examinations are referred to State and Territory Health Clinics (STHCs) to be completed.
Meets	A MOC has determined the applicant has met the health requirement.
Meets with Comments	A MOC has determined the applicant has met the health requirement and sent comments for the VPO.
Meets with Undertaking	A MOC has determined the applicant has met the health requirement subject to the applicant providing the VPO with a signed 815 undertaking form.
Does Not Meet	A MOC has determined the applicant has not met the health requirement.
No Clearance Required (NCR)	A MOC has indicated that an applicant is not a threat to public health.
NCR with Undertaking	A MOC has indicated that an applicant must sign an 815 undertaking form due to potential public health issues.
NCR – Auto	The health case has passed auto clearance rules and has been automatically finalised.
NCR– Admin	The MMSP health processing staff have not identified any public health concerns, and recommend the health case be cleared.
NCR – VPO	The VPO has not identified any public health concerns, and recommends the health case be cleared.
Health not completed	This health case has been closed because the applicant did not complete their health examinations or the case was created in error.
<u>Waiver Status</u>	
Waiver Must Be Considered	A MOC had determined the applicant did not meet the health requirement and a health waiver is available and must be considered.
Sent to Immigration Health	A VPO has uploaded a health waiver submission into HAP – Health Assessments and sent to Immigration Health for a recommendation on whether a health waiver is supported or not.
Waiver Supported	Immigration Health has recorded their recommendation indicating that a health waiver is supported.
Waiver not supported	Immigration Health has recorded their recommendation indicating that a health waiver is not supported.
Waived	A VPO has recorded the delegate's decision to waive the health requirement.
Not Waived	A VPO has recorded the delegate's decision not to waive the health requirement.
AAT Remit	A VPO has recorded the AAT direction that the applicant meets the health requirement in HAP – Health Assessments.
<u>Undertaking Status</u>	
Required	The applicant is required to sign an 815 health undertaking form.
Form sent	The applicant has been sent the 815 health undertaking form.
Form received	A completed and signed 815 health undertaking form has been received by Home Affairs from the applicant.
Arrived	The visa holder on a health undertaking has now arrived in Australia.
Primary non-compliant	Visa holder who has failed to contact the Health Undertakings Service (HUS) within 28 days of arriving in Australia as required.
Interim compliant	Visa holder called HUS but could not be allocated to a clinic as they were departing Australia shortly.
Interim non-compliant	Visa holder who advised HUS they could not attend a clinic due to an imminent departure from Australia, but failed to depart as advised. Case now requires further management.
Primary Non-Compliant - Uncontactable	The visa holder failed to contact HUS and HUS have been unable to contact the visa holder despite attempts to do so on at least 3 occasions.

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Value	Meaning
Allocated to clinic	Visa holder has been referred to a clinic and no outcome has been recorded yet.
Appointment Attended	Visa holder has attended an appointment but is yet to be discharged. Visa holders are not considered Compliant with their Health Undertaking until they have been discharged from a State/Territory Clinic.
Clinic follow up required	Visa holder has failed to advise Home Affairs whether they attended their appointment.
Departed	Visa holder was allocated to a clinic but then departed Australia.
Compliant	Visa holder has complied with their health undertaking obligation.
Secondary noncompliant	Visa holder has been recorded as failing to attend their clinic appointment, but Home Affairs has not yet recorded as "non-compliant".
Non-compliant	Visa holder who Home Affairs has recorded in HAP- Health Assessments as "non-compliant" and need to be sent a non-compliance letter and placed on MAL.
Inactive	The visa holder has been given a subsequent MOC opinion that has superseded the health undertaking.
Undertaking Administratively Closed	Visa holder is no longer required to comply with their Undertaking as: <ul style="list-style-type: none"> • new medical information has been received and a new MOC opinion will be provided; • visa holder has received a subsequent 'unconditional' health clearance; • Visa holder has since become an Australian citizen.
<p><u>Departure Health Check (DHC) Advice</u></p> <p>* This applies to all 200 subclasses except subclass 202.</p>	
Cleared to travel	DHC has been completed and the visa holder is fit to travel without any special arrangements.
Cleared to travel with Escort	DHC has been completed and the visa holder is cleared to travel with an Escort. Note: This only applies to subclass 202 visa holders in which case the Escort costs are the responsibility of the sponsor and a MOC/ Home Affairs financial delegate is not required to consider the escort request. The sponsor's approval needs to be obtained before the DHC is finalised with this outcome.
* Escort Requested	DHC provider identifies the need for an Escort and request Home Affairs consideration and approval. Note: This is not a final outcome.
* Escort clinically supported and approved	MOC supports the Escort on clinical grounds and the financial delegate has approved this. Note: The escort request requires clinical support of a MOC and approval of a Home Affairs financial delegate for the Escort travel costs.
* Escort clinically not supported	A MOC does not support the need for an Escort on the basis that an Escort is not necessary i.e. travel should proceed without Escort.
* Escort Not Approved	The financial delegate does not approve request for an Escort (clinically supported).
Travel deferred - MOC	The MOC does not support travel. The visa holder's condition may require stabilisation before future travel.
Travel deferred - Clinic	DHC provider decides not to proceed with the planned travel based on the visa holder's condition.
DHC Not Completed	DHC provider is unable to complete the DHC for any number of reasons.

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What does the action panel allow me to do?

- Create a [New assessment](#) on the health case
- [Manage health case](#) to allow access to other functions such as:
 - [extend health clearance validity](#)
 - [recording paper medical results](#)
 - [Uploading of any health related attachments](#)
- View action history – This allows you to audit the health case and see what has happened at various steps of the process.

Action

No action chosen

New assessment

Manage health case

View Action History

How can I tell why a health case failed auto clearance?

VPO's have the ability to view in HAP – Health Assessments why a health case has failed the HAP's auto clearance rules. This information can be found under Auto-clear failed details under the Current health case information. **Note:** Health cases with an assessment status of 'Auto clear denied' or 'Sent to MOC' require assessment by a person and are not finalised outcomes.

Current Health Case

Client Checks

Is this Health Case linked to a Visa application?	Yes
Does the client have a previous Does Not Meet opinion?	No
Does the client have Identity concerns?	No

Auto-clear failed details

- Rule Id 10020 - Medical Exam - Abnormal, Present or Yes value detected.
- Rule Id 10036 - Health Case has Expired Exams.

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How do I find all the health correspondence that has been generated for the HAP ID?

Correspondence generated during the process of a health case assessment may include any 884 MOC opinion correspondence generated for the applicant, including Waiver regulations.

The System Links panel within the Health Case Details section will let you know the TRIM container that has been used to store any health related correspondence and health case attachments, including blood reports and x-rays

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Health Case Details

Client Personal Details

Title	-
Family Name	TEST
Given Name/s	Client
Sex	FEMALE
Date of Birth	01 Jan 1980
Preferred language	-
Interpreter required	-
Advised departure	-

System Reference

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Related HAP ID(s)	-
TRN	-
IRIS	-
ELMA Case ID	-
IRIS Schedule	-

Health Case Details

Source system	ICSE
Case Created	15 Sep 2017
Batch number	-
Process Type	Electronic
Priority	Normal
Health case type	Cinshore
TB risk Level	Higher

Travel Document Details

Passport number	-
Travel Doc ID	-
Issuing country	-
Issue date	-
Expiry date	-

System Reference

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ELMA Case ID	-
IRIS Schedule	-

Visa Details

Processing Centre	-
Subclass/type	417 - WORKING HOLIDAY
Stream	-
Assessment Period	1 year
Visa status	-
Intended length of Stay	12 month(s)
Cumulative stay in Australia	-

System Links

TRIM Communications	BCC2017/41352
TRIM - Paper medicals box	-
TRIM - Film x-rays box	-
Movement History	Portal Link
CMAL	Portal Link

Client Information: TEST, Client FEMALE, 01 Jan 1980

IME Summary: Status Finalised, Clearance expires 15 Sep 2018

Health Alerts: Previous DNM ***

Type: 417 - WORKING HOLIDAY Assessment Temporary (1 yr)

Assessment Status: Meets 15 Sep 2017

Waiver processes in HAP – Health Assessments

Where a MOC has provided a Does Not Meet outcome on a health case, and a health waiver is available, VPO's at the EL1 or above level must give careful consideration as to whether a health waiver should be exercised. VPO's are required to prepare the relevant health waiver submission template to document and record their decision. All health waiver submissions must be attached in HAP – Health Assessments for reporting purposes. For detailed instructions on processing a health waiver in the HAP, refer to the [Managing health waivers](#) tip sheet on the intranet.

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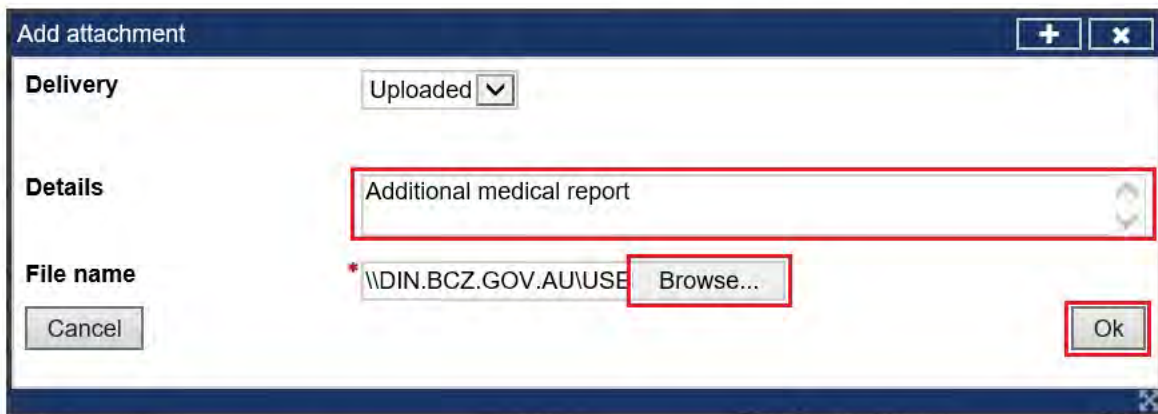
How do I upload extra attachments into HAP – Health Assessments?

To upload any additional health related attachments onto the health case, you will need to:

1. Search for the health case in Health Assessments
2. Select **Manage Health Case** in the Action panel and press the **Confirm** button.
3. Scroll to the bottom of the health case.
4. Click **'Add attachment'**



5. Fill in the **Details** of the attachment, **Browse** your computer for the file and press **Ok**



6. The attachment will display successfully attached to the health case under the **Attachments** panel.



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How do I extend the validity of an applicant's health clearance?

In line with the Health Requirement Procedural Instruction, VPO's can, in certain situations, extend the validity of an applicant's health clearance. VPO's should only extend a health clearance in exceptional circumstances and after careful consideration of health policy, and should not just provide an extension automatically. VPO must use the functionality in HAP – Health Assessments to extend the validity of an applicant's health clearance. If extension of a health clearance is available under policy, however the VPO is unable to provide the extension in HAP – Health Assessments, VPO's should contact s. 47E(d) to investigate.

1. Search for the health case in HAP - Health Assessments
2. Select **Manage Health Case** in the Action panel and press the confirm button.
3. Scroll to the bottom of the health case.
4. Press the **Extend** button next to current assessment.

Current Health Case

Client Checks

Is this Health Case linked to a Visa application? No
 Does the client have a previous Does Not Meet opinion? Yes
 Does the client have Identity concerns? No

Examinations

Examinations	Status	Exam. Date	Service Provider	Grade	Source	Re-used from	Audit	View
Medical Examination	Expired	13 Oct 2014	Mr Doctor TESTING Central Health Testing Clinic	A Grade	eMedical	149971	Audit	Q
Chest X-ray Examination	Expired	13 Oct 2014	Mr Radiologist TESTING Central Health Testing Clinic	A Grade	eMedical	149971	Audit	Q

Current Assessment

Assessed	Expires	Actioned By	Centre	Outcome	View	
13 Oct 2014	13 OCT 2015	HAPLOAD	Australian Service Provider	ACLR(4005)	Q	Extend

Previous Assessment

No Previous Health Assessments

The *Extend Assessment Expiry* window will appear.

5. The Assessment Expiry Date will automatically default to an additional 6 months when you complete the process and you must select one of the two assessment extension reasons listed below.

Note: Details are required if you are selecting compelling and compassionate reasons for the extension reason.

Extend Assessment Expiry

Assessment Current Expiry Date: 13 Oct 2015

Assessment Extension Reason: **Delays in processing not caused by visa applicant**

Details: **Compelling or compassionate reasons**

Buttons: Cancel, Ok

6. Press the **OK** button. The expiry date on the current assessment will now have been updated + 6 months to reflect the extension that you have just actioned.

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CLIENT, TEST
MALE, 01 Jan 1980

IME Summary

Status
Finalised

Clearance expires
13 Apr 2016

Health Alerts

Previous DNM ***

Type

417 - WORKING HOLIDAY
Assessment
Temporary (1 yr)

Assessment Status

Auto Cleared 13 Oct 2014

Current Health Case

Client Checks

Is this Health Case linked to a Visa application? Yes
Does the client have a previous Does Not Meet opinion? Yes
Does the client have identity concerns? No

Examinations

Examinations	Status	Exam. Date	Service Provider	Grade	Source	Re-used from	View
Medical Examination	Expired	13 Oct 2014	Mr Doctor TESTING Central Health Testing Clinic	A Grade	eMedical	s. 47F(1)	q
Chest X-ray Examination	Expired	13 Oct 2014	Mr Radiologist TESTING Central Health Testing Clinic	A Grade	eMedical		q

Current Assessment

s. 47F(1)	Assessed	Expires	Actioned By	Centre	Outcome	View
	13 Oct 2014	13 APR 2016	HAPLOAD	Australian Service Provider	ACLR(4005)	q

An updated expiry date will also be sent to CSP and the visa processing system:

- In ICSE - a new event will be added reflecting the new expiry date

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Finalised Health Requirement	Auto Cleared	14/10/2015	14/10/2015	TEST, Client	149971,13/04/2016

- In IRIS - the expiry date will simply be updated (i.e. overridden) with the new expiry date

Additional HAP Information

HAP Outcome: T - Auto Cleared System: E
Health Asmt Expiry: 05-FEB-15 ID Concerns: N MOC Comments: N
Waiverable: Undertaking:

F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	F11	F12	SEND
INFO				MARK		PGUP	PGDN	SCHED		HELP	EXIT	HAP
HWVR	UNDR			ORIDE				REQ		HELPS		

Note: HAP – Health Assessments will also display the following information on the 'View Previous Assessment' window:

- Extension reason
- Name of the officer requesting the extension
- Date the extension was actioned
- The new expiry date

View Current Assessment

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- Pre Exam
- 501 Medical Exam - Full Report
- 502 Chest X-Ray Exam - Full Report
- Decision - Auto Cleared
- Assessment History**

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Health Undertakings

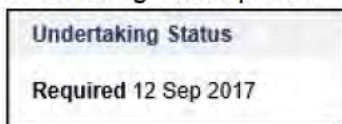
If a health undertaking is required, it will be displayed in the department's visa and health processing systems. It will also be indicated in the 'Form 884' MOC opinion that is generated.

Note: An undertaking is required for all *Meets with Undertakings* outcomes. Undertakings can also be requested for *Does Not Meet* opinions and *No Clearance Required* opinions. This will be displayed on the 884, but is also shown in the HAP – Health Assessments and in CSP under the 'Undertaking Required' field.

- In CSP: the *Undertaking Required* field will display **Yes**.



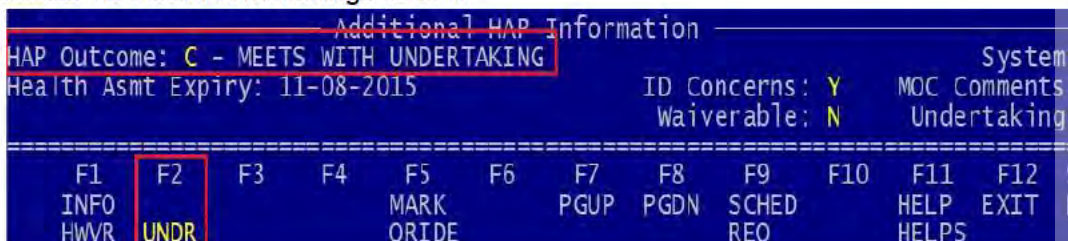
- In HAP – Health Assessments: the status bar on the left of the screen will display **Required** in the Undertaking Status panel.



- In ICSE: A 'Follow up outstanding' event will display to remind the officer that they are required to record Health Undertaking details in HAP – Health Assessments.



- In IRIS:
- You will not be able to grant until all information is recorded in HAP – Health Assessments
- A 'C' code 'Meets with Undertaking' will display as in the health code field on the visa processing screen and in HAP – Health Assessments.
- More detailed information about the undertakings process can also be viewed by pressing F2 to access the Health Undertakings screen.



Recording the 815 Health Undertaking Form in HAP

VPO's need to ensure that the applicant is provided with a copy of 815 Health Undertaking form. Once the applicant has signed and returned the 815 Health uUndertaking form, VPOs will need to update HAP – Health Assessments with the following:

- Scanned/Signed copy of 815 form
- The date the 815 Health Undertaking form was sent
- The date the 815 Health Undertaking form was received
- Also, ensure ICSE/IRIS is updated with the most up to date contact information for the client – this will assist with the undertaking process onshore.

1. Search for the health case in Health Assessments
2. Select **Manage undertaking** in the Action panel and press the **Confirm** button

The screenshot shows the 'Action' panel with the following options:

- No action chosen
- New assessment
- Manage health case
- Manage undertaking
- View Action History

A 'Confirm' button is located in the bottom right corner of the panel.

3. The *Manage Undertaking* screen will appear which allows you to record undertaking form details in HAP – Health Assessments.
4. Scroll to the bottom of the screen and select **Record undertaking form details** in the Action panel.
5. Record the **Date Sent** – This is the date that the 815 Form was sent to the applicant and the **Date Received** – This is the date that the applicant signed and returned the completed 815 form

The screenshot shows the 'Record undertaking form details' screen with the following information:

- Required**
- Date**: 17 Nov 2020
- Status**: Required
- No selection made
- Change status
- Record undertaking form details
- Date Sent:** 17 Nov 2020
- Date Received:** 17 Nov 2020
- Attach Form 815** button
- Cancel** and **Confirm** buttons at the bottom.

6. Select **Attach Form 815** to upload a copy of the completed / signed Form 815

This screenshot is identical to the previous one, but the 'Attach Form 815' button is highlighted with a red box.

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7. Once the signed Form 815 has been uploaded, select the **Confirm** button.

8. The Undertaking status for the health case will be updated

ICSE case - The health outstanding event in ICSE will be finalised with the qualifier 'Meets with Undertaking-Form Received'. No further action is required to be undertaken. The Record health undertakings details in HAP follow up event will also be automatically finalised.

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IRIS case - will be updated to reflect that undertaking processing has been completed and you will be able to proceed to visa finalisation.

```
(IR191-V#59.02) - HAP UNDERTAKING INFORMATION -
Family Name: TEST Given Names: CLIENT
Over-riden:
Undertaking Required: Y
Undertaking Sent: Y Date (DD-MM-YYYY): 20-03-2015
Undertaking Received: Y Date (DD-MM-YYYY): 20-03-2015
```

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How do I create a New Assessment ?

Please ensure you have assessed all factors before proceeding with creating a new assessment. If you incorrectly create a new assessment, please contact s. 47E(d) for assistance.

To create a New assessment you need to:

1. Navigate to the *Case Search* screen and enter the applicant's HAP ID then press **Search**. The *Health Case Details* screen will appear.
2. Scroll to the bottom of the health case and select the correct **New Assessment** option for the case that you are managing from within the Action panel.

Note: more detailed instructions for each option are provided below.

1. Request a new assessment against a different regulation

Applicant's health clearance has been assessed against the wrong regulation (PIC) and the VPO requires the MOC to re-assess their health case to provide a new MOC opinion against a different PIC.

- a) Select the regulation that you want the health cases to be assessed against from the drop down list

Note: only valid PICs listed in the regulations for the relevant visa subclass will appear.

- b) Press the **Confirm** button

Note:

- **If the health case is electronic:** the case will automatically be Sent to the MOC for re-assessment and no further action is required by the officer to facilitate this.
- **If the health case is paper:** the case will be updated to a status of Awaiting Assessment. Please note that the Migration Medical Services Provider (MMSP) will be unable to re-assess the case until they obtain any required health examination reports that need to be considered. MMSP (Bupa) will arrange to obtain these reports themselves directly or via Immigration Health Branch (IHB). No further action is required by the officer to facilitate this (unless paper files are held by the visa officer).

IME Summary
Status Outstanding
Next step Medical officer to assess
Type 417 - WORKING HOLIDAY
Assessment Status Sent to MOC 27 Jun 2016

IME Summary
Status Outstanding
Next step Case being prepared for Medical officer
Type 417 - WORKING HOLIDAY
Assessment Status Awaiting Assessment 27 Jun 2016

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2. Organise for the applicant to complete repeat health examinations

The VPO requires the applicant to undergo repeat health examinations as their previous ones have or are about to expire on the visa being processed. The VPO will have access to this if:

- Health case is expired
- Health case will expire within 6 months
- Health case is not a DNM or No Clearance Required (NCR) outcome

Note: HAP will generate standard exams and therefore, you must ensure that all required exams have been generated in line with policy. If examinations are missing, please contact s. 47E(d)

a) Press the **Confirm** button

The screenshot shows a dialog box titled "Action". It contains several radio button options: "No action chosen", "New assessment" (which is selected), "Manage health case", and "View Action History". Below these is a section for "New assessment reason" with three options: "Organise for the client to complete repeat health examinations" (selected), "Request a new assessment based on additional medical information being received", and "Study/work in health care". A "Confirm" button is located in the bottom right corner.

b) You will be promoted with a message to confirm you would like to create a new assessment, to proceed press **Ok**.

The screenshot shows a "Message" dialog box with a dark blue header. The main text reads: "Important: This action cannot be undone. Please make sure that you require the client to complete repeat health examinations for this visa application because their health clearance has expired before proceeding." There are "Cancel" and "Ok" buttons at the bottom.

c) Once the new assessment has been created, you will see that the Assessment Status will have been updated to New.

The screenshot shows a green notification box with a checkmark icon and the text "Success" and "A New Assessment has been created".

Note: the applicant can now be provided with the same HAP ID and they will be able to attend a panel clinic to complete their repeat set of health examinations.

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3. Request a new assessment based on additional medical information being received

The applicant was given an outcome, but the visa officer has since received new **medical** information that a MOC needs to consider and provide a new opinion.

Note: Do not create a new assessment if the applicant has only provided **non-medical** information. If the visa officer is unsure whether the information provided is medical in nature please contact s. 47E(d) before proceeding any further.

- a) Scan the additional information the visa officer received (if the visa officer did not already receive it electronically) and press the **Add Attachment** button

- b) The visa officer will be prompted with a message to confirm the attachments the visa officer is attaching is new "Medical Information" that the MOC has not already seen. **Note:** This action cannot be undone - please ensure you would like to create new assessment based on new Medical Information.

- c) **Browse** to find and attach the attachment and press **OK**. The visa officer will be returned to the previous action panel

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d) Press **Confirm** button

Action

No action chosen
 New assessment
 Manage health case
 View Action History

Information

Document HIV test report.pdf attached, Continuing will create an assessment.

New assessment reason

Organise for the client to complete repeat health examinations
 Request a new assessment based on additional medical information being received
 Study/work in health care

Attachments

Filename	View	Result	Delivery	Arrived	Details	Associated exam	Date Attached
Glasgow01922.dcm	View	Uploaded		Yes		502 - Chest X-ray Examination	14 Sep 2015
alf.jpg		Uploaded		No			27 Apr 2016
HIV test report.pdf		Uploaded		Yes			27 Jun 2016

Note:

- **If the health case is electronic:** the case will automatically be Sent to the MOC for reassessment and no further action is required by the visa officer to facilitate this – with the attachment now attached under the attachments panel.
- **If the health case is paper:** the case will be updated to a status of Awaiting Assessment. MMSP will be unable to re-assess the case until they obtain any required health examination reports that need to be considered in conjunction with any new **medical** evidence that the visa officer has attached in HAP or sent through to MMSP as per normal arrangements. MMSP (BUPA) will arrange to obtain these reports themselves directly or via IHB. No further action is required by the visa officer to facilitate this (unless paper files are held by the visa officer).

Message + x

Important: This action cannot be undone. Please make sure that you require the client to complete repeat health examinations for this visa application because their health clearance has expired before proceeding.

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4. Request a new assessment for a different assessment period

The visa officer requires a MOC to re-assess a case for a different assessment period – e.g. because the visa officer intends to grant the visa for a shorter period than they were originally assessed for.

Note: This is relevant for cases where the MOC provided a DNM opinion. If the applicant received a DNM when completing permanent health examinations for a temporary visa, you **MUST** request a reassessment for the correct period of stay that you intend to grant the visa for.

a) Enter the assessment period you wish the applicant’s health case to be re-assessed for.

Note: the permanent assessment period box will only appear checked where the correct set of permanent health examinations has been completed by the applicant.

b) Press **Confirm** button

Note:

- **If the health case is electronic:** the case will automatically be Sent to the MOC for re-assessment and no further action is required by the visa officer to facilitate this
- **If the health case is paper:** the health case will be updated to a status of Awaiting Assessment. MMSP will be unable to re-assess the health case until they obtain any required health examination reports that need to be considered in conjunction with any new **medical** evidence that the visa officer has attached in HAP or sent through to MMSP as per normal arrangements. MMSP (Bupa) will arrange to obtain these reports themselves directly or via IHB. No further action is required by the visa officer to facilitate this (unless paper files are held by the visa officer).

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5. Request a new assessment as the applicant intends to study/work in health care

The applicant is intending to work as (or study to be) a doctor, dentist, nurse or paramedic, but failed to declare this when they applied for their visa/submitted their My Health Declarations form. Consequently, their health case does not currently contain all the required health examinations (i.e. medical, x-ray and blood tests).

Note: If the health case has any exam that is "Finalised Incomplete" that exam will be re-added to the case.

- a) Select **Study/work in health care** option from **New assessment** reason and press **Confirm** button

- b) Once the new assessment has been created, you will see that the Assessment Status will have been updated New.
- c) The additional health examinations that are required will also have been added to the health case.
Note: the applicant can now be provided with the same HAP ID and they will be able to attend a panel clinic to complete their outstanding set of health examinations.

IME Summary

Status
Outstanding

Next step
Health to be undertaken

Type
500 - Student (Temporary)

Assessment Status
New 27 Jun 2016

Examinations								
Examinations	Status	Exam. Date	Service Provider	Grade	Source	Re-used from	View	
HIV test	Required	-		-	-	-	b, p, e, a	
Hepatitis B test	Required	-		-	-	-	b, p, e, a	
Hepatitis C test	Required	-		-	-	-	b, p, e, a	
Medical Examination	Finalised	09 Jun 2016	Dr Automation Team Automation Clinic	A Grade	Paper	-		
Chest X-ray Examination	Finalised	09 Jun 2016	Dr Automation Team Automation Clinic	A Grade	Paper	-		

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When do I need to seek assistance to create a new assessment?

There are still scenarios where a new assessment may be required but visa officers will not be able to create a new health assessment in HAP – Health Assessments themselves, refer to the Health Requirement Procedural Instruction.

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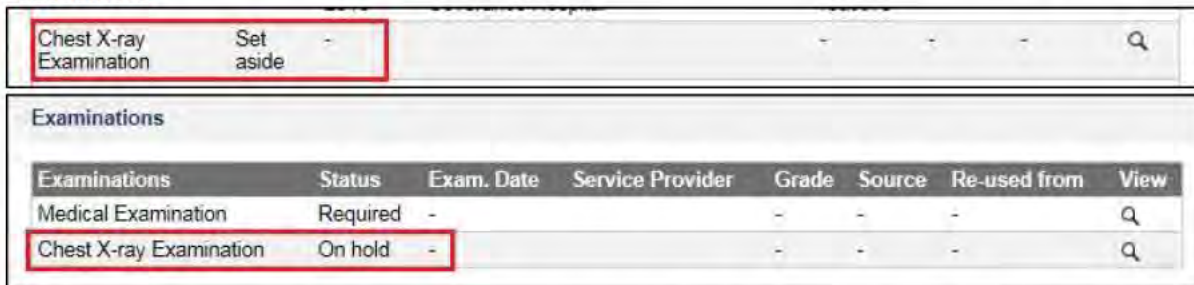
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How can I find out if an applicant has declared pregnancy at the time of IME?

1. Search for the health case in HAP - Health Assessments
2. Scroll to the bottom of the screen to view the **Current Health Case** examinations that the applicant completed for their IME assessment.

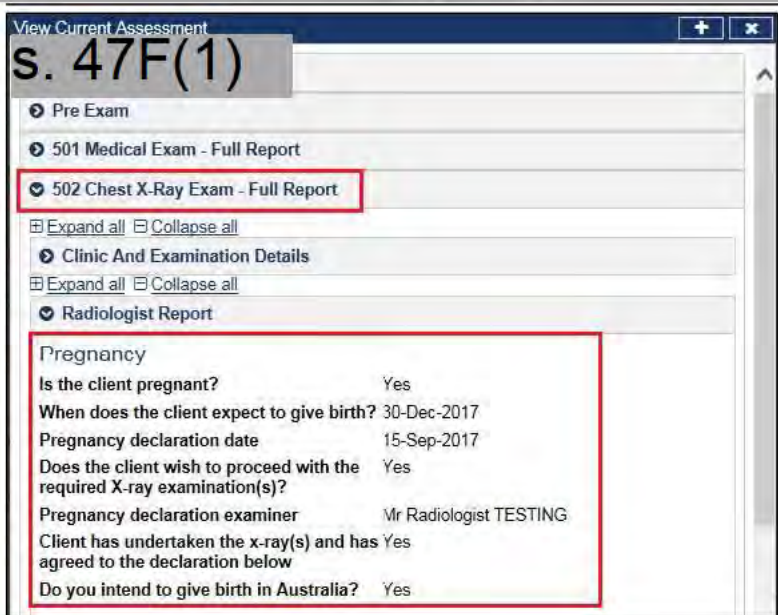


3. If the status of the 502 (Chest x-ray examination) is **Set aside** (Lower TB risk applicants) or **On Hold** (Higher TB risk applicants), this confirms that the applicant was pregnant at the time of the IME health assessment.



4. The visa officer can also view the HAP ID assessment to confirm the pregnancy declaration on the 502 provided by the applicant at the time of IME.

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How can I find an applicant’s polio vaccination status?

To determine which applicants are required to present a polio certificate and for further information regarding polio requirements refer to the Health Requirement Procedural Instruction.

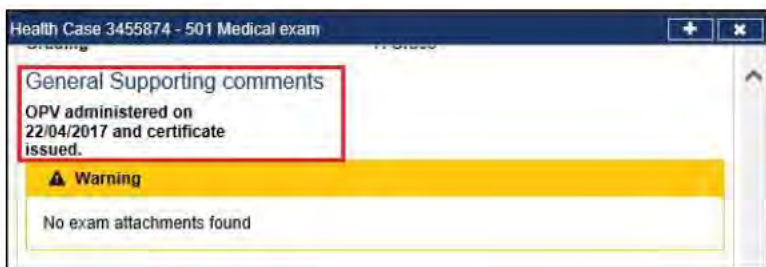
For electronic cases

1. Search for the health case in HAP - Health Assessments
2. Scroll to the bottom of the screen to view the Current Health Case examinations that the applicant completed for their IME assessment.
3. You can press the view magnifying glass on the 951 Vaccination examination to view any details recorded by the panel physician or any attachments added



4. Alternatively the clinic may have recorded this information in the 501 Medical examination general supporting comments. You can press the view magnifying glass on 501 Medical examination to view this information.

Note: Any attachments attached to the health case can be found under the attachments panel.



For paper cases


Check the panel physician’s responses in the Form 26, particularly any notes regarding polio vaccination certificates.

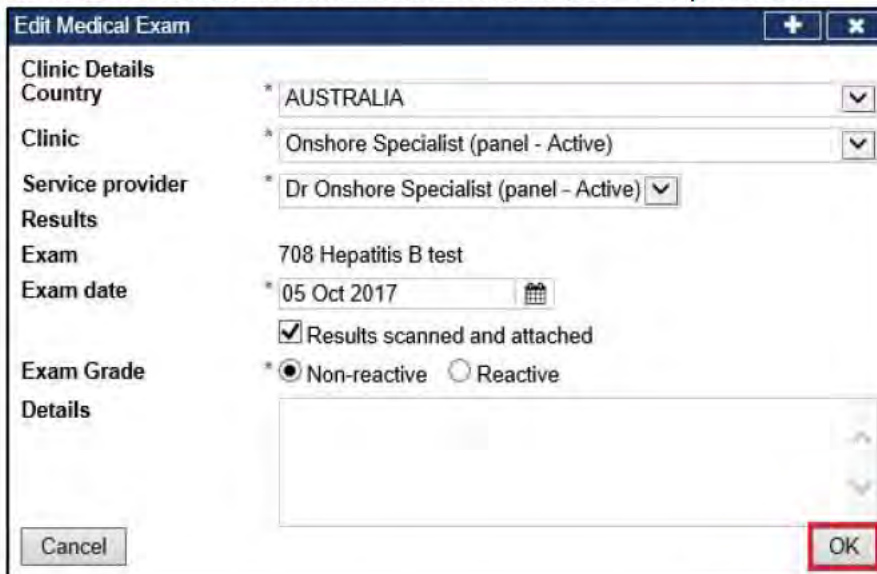
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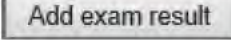
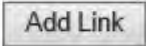
For Official Use Only

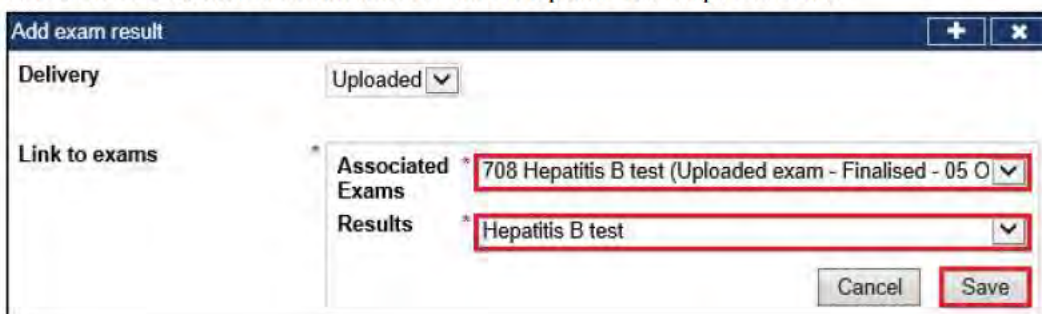
How do I record Hepatitis B paper results?

As per the Health Requirement Procedural Instruction, the visa officer is required to record Hepatitis B results that have been received for a pregnant visa applicant in Australia.

1. Search for the health case in HAP - Health Assessments
2. Scroll to the bottom of the screen and press **Manage Health Case** in the Action panel and press the **Confirm** button.
3. Press the 'edit pencil icon'  to edit the Hepatitis B test result.
4. Record the details of the examination result as below and press **OK**.



5. Upload the Hepatitis B scanned results by pressing on the  button under attachments.
6. Press the **Add Link** button .
7. Select the **Associated Exam** and **Results** Hepatitis B and press **Save**



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8. **Browse** the file to be uploaded and press **Ok** to upload the Hepatitis B results

Add exam result

Delivery: Uploaded ▾

Link to exams

Add Link

Delete	Associated Exam	Result	Description	Edit
	708 - Hepatitis B test	Hepatitis B test		

Details

File name: \\IMMI.LOCAL\Dfs\Users\' Browse...

Cancel Ok

9. The results will then be uploaded into the **Attachments** panel.
10. Proceed to locally clear the results or send to onshore for processing to the MMSP as per the Health Requirement Procedural Instruction.

Note: Steps to locally clear or send onshore for processing can be found within tip sheet '*Processing paper health examinations in HAP*' on the [intranet](#)

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HAP - Health Assessment processes

This tip sheet is designed to assist visa processing officers (VPO) with the system processes that are involved in viewing and understanding the progression of a health case. It will also explain other functions that are available in HAP - Health Assessment to visa officers after the applicant has completed their health.

There are also a number of other tip sheets regarding health related processes available on the intranet at: <https://intranet.bcz.gov.au/border-ops/processing/visa/health/processing-guidelines-visa-officers>

Migration Medical Services Provider (MMSP) Communication protocols

Our MMSP is Bupa Medical Visa Services (Bupa). If you require assistance to progress an assessment of a health case, please use the agreed communication protocols noted on the intranet.

<https://intranet.bcz.gov.au/border-ops/processing/visa/health/migration-medical-services-provider-communication-protocols>

CSP Merge

Note: If you are required to complete a client merge, instructions are available via the below TRIM links. If you require an urgent merge, please ensure you set the priority accordingly.

- ADD2015/382336 - Requesting a client merge using the Client Search Portal (CSP)
- ADD2015/382356 - Requesting a client merge using the Client Search Portal (CSP), if PIDs already merged in TRIPS

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Glossary

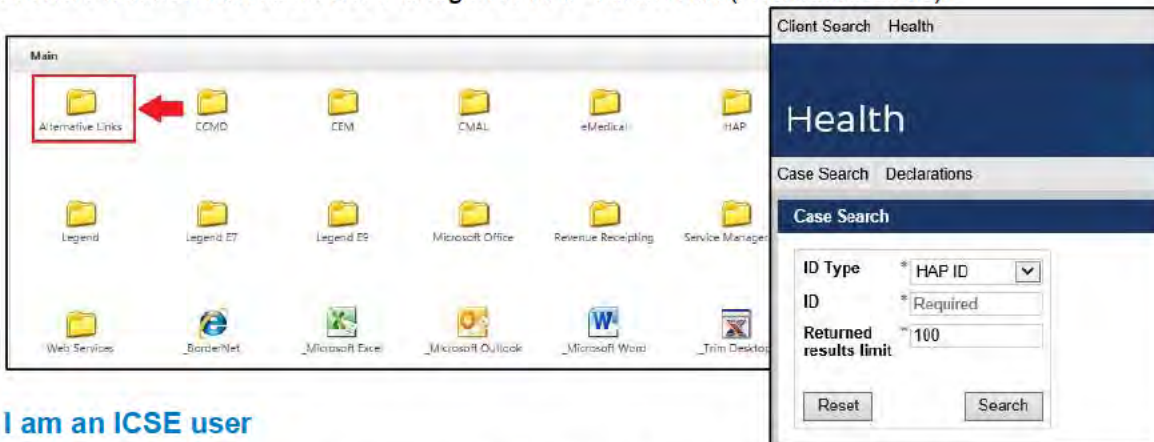
Term	Acronym (if applicable)	Definition
Department of Home Affairs	Home Affairs	A department of the Government of Australia that is responsible for immigration, citizenship and border control.
Does not meet	DNM	The applicant has not met the health requirement and a visa cannot be granted unless a health waiver is available and exercised.
Health Assessment Portal	HAP	A departmental system that allows officers to record applicant health declaration data, determine what immigration medical examinations applicants are required to undertake, and generate health identifiers and documentation.
Health Care Worker/Student	HCW/HCS	An applicant intending to work as, or study to be, a doctor, dentist, and nurse or ambulance paramedic in a health care environment.
Integrated Client Services Environment	ICSE	A departmental visa processing system that provides support for the processing and evidencing of citizenship applications as well as other onshore visa processing tasks.
Immigration Records Information System	IRIS	A departmental visa processing system used primarily to support the processing of visa applications offshore. Used to be the primary offshore visa processing system.
Immigration Medical Examinations	IME	The medical examinations required to determine whether a visa applicant satisfies the health requirement.
Medical Officer of the Commonwealth	MOC	Registered medical practitioner appointed by the Department of Home Affairs . They may work directly for the Department, or be employed by the Migration Medical Services Provider.
Migration Medical Services Provider	MMSP	The Department's contracted onshore MMSP. The current provider is Bupa Medical Visa Services (Bupa).
State and Territory Health Clinic	STHC	The designated authority within that state or territory that deals with the comprehensive investigation, management, treatment and reporting of a specific health condition.

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How do I access HAP - Health Assessments?

I am an IRIS/CITRIX user

Offshore IRIS/CITRIX users need to logon to HAP via CITRIX (Alternative Links).

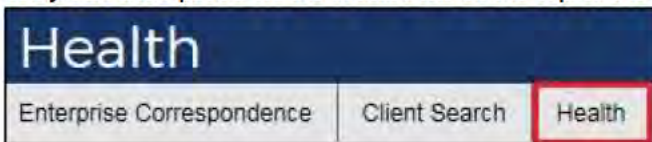


I am an ICSE user

VPOs need to select **Health Assessment** under Quick links on the intranet home page. You can manage your preferences by selecting "Manage" to display the most used portals. Alternatively, if this does not appear you should select **Client Search**.



They can then press on the Health tab at the top of the portal screen.



The HAP - Health Assessment can also be accessed by selecting the blue hyperlink [HAP](#) when a HAP ID is associated to a visa applicant on their visa application in ICSE.

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How do I search for a health case

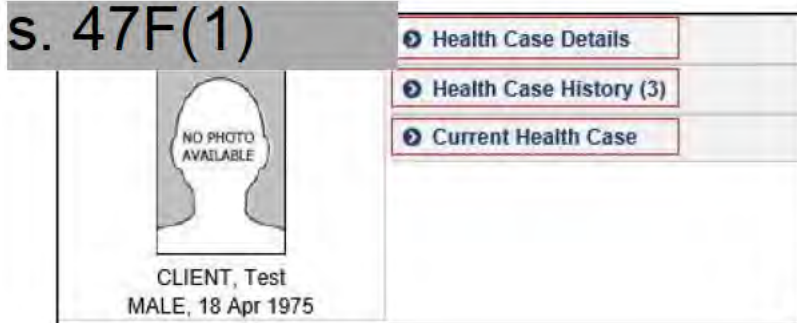
1. Open the **Case Search** screen in HAP
2. Select ID Type, the relevant IDs are **HAP ID**, **Visa Request ID** or **TRN** and type in the unique identifier
3. Press **Search**.



The case you are looking for will appear with the Current Health Case open by default.

I have found the case but I don't know what I am looking for?

The panel on the left of the page contains summary information, which will assist you to understand the current status of the health case. You can use the “twisty” (these are arrows) to expand the screen to see more details of the health case.



See below for further details.

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Health Case Details

This section displays important information in relation to the health case and its creation.

Health Case Details

Client Personal Details	
Title	-
Family Name	TEST
Given Name/s	CLIENT
Sex	FEMALE
Date of Birth	28 Nov 1991
Preferred language	-
Interpreter required	-
Advised departure	-

Health Case Details

Source system	eVisa
Case Created	19 Jul 2017
Batch number	-
Process Type	Electronic
Priority	Normal
Health case type	Offshore
TB risk Level	Higher

Visa Details

Processing Centre	-
Subclass/type	485 - Temporary Graduate
Stream	34 - Post-Study Work
Assessment Period	4 years
Visa status	-
Intended length of Stay	48 month(s)
Cumulative stay in Australia	597 day(s)

System Links

s. 47F(1)	
TRIM - Paper medicals box	-
TRIM - Film x-rays box	-
Movement History	Portal Link
CMAL	Portal Link

s. 47F(1)

Information regarding the health case creation, including the TB risk level used to calculate health requirements

The visa subclass/type associated to the health case, intended period of stay and calculated cumulative stay

System links associated to the health case, the TRIM BCC file hyperlink contains HAP system generated correspondence

Health Case History (3)

Health Case History

This section will display any health cases that are related to the client. You can click on the HAP ID hyperlink to take you directly to that health case.

Health Case History (3)

HAP ID	Assessed	Expires	Actioned By	Outcome	Subclass	View
s. 47F(1)	-	-	-	-	417	Q
-	-	-	HAPLOAD	-	600	Q
-	-	-	Iadmin Four	Does Not Meet	457	Q

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Current Health Case

This section displays important information in relation to the examinations, attachments and assessment of the visa applicant's health case.

☑ Current Health Case

Client Checks

Is this Health Case linked to a Visa application?	Yes	This examination section displays details of the examinations undertaken by the visa applicant. You can also view the information recorded for this exam by clicking on the magnifying glass
Does the client have a previous Does Not Meet opinion?	Yes	
Does the client have Identity concerns?	No	

Examinations

Examinations	Status	Exam. Date	Service Provider	Grade	Source	Re-used from	View
Chest X-ray Examination	Expired	12 Feb 2015	Mr Radiologist TESTING Central Health Testing Clinic	-	eMedical	-	Q

Current Assessment

S. 47F(1)	Assessed	Expires	Actioned By	Centre	Outcome	View
	12 Feb 2015	12 FEB 2016	HAPLOAD	Australian Service Provider	ACLR(4005)	Q

Previous Assessment

This section displays the current assessment outcome and any previous assessments

No Previous Health Assessments

Assess ID	Assessed	Expires	Actioned By	Centre	Outcome	View
No Previous Health Assessments						

Attachments

This section displays attachments that are associated to this health case

Filename	View	Result	Delivery	Arrived	Details	Associated exam	Date Attached
Glasgov0192.dcm	View	Uploaded		Yes		502 - Chest X-ray Examination	12 Feb 2015

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Health Summary Panel

The side panel of a health case in the HAP is the best place to start as this displays comprehensive details of the health case. See below for an explanation of the different fields displayed in this panel.

s. 47F(1)



TEST, Client
MALE, 01 Jan 1980

IME Summary

Status
Finalised
Clearance expires
12 Sep 2018

Health Alerts

Identity concern raised
●●●
Previous DNM ●●●

Type

417 - WORKING HOLIDAY
Assessment
Temporary (1 yr)

Assessment Status

Meets 12 Sep 2017

The applicant's **health case** or HAP ID appears at the top of the side panel.

For eMedical cases, the digital photo taken by the panel clinic will appear, with the applicant's bio-data below the photograph.

The **IME Summary** will provide an overview of the status of the health case (e.g. outstanding or finalised). If the case is in progress, then the next step and who is required to action will display. If the status is finalised, the clearance expiry date will also display.

The **Health Alerts** field will only appear if there any identity concerns has been raised by the panel clinic and/or if there a previous DNM opinion for this visa applicant.

The **Type** field will display the visa subclass and the clearance type (Permanent or temporary). The assessment period will also be displayed for a temporary clearance.

The **Assessment Status** field will display the status of the health case and when the assessment was finalised (i.e. in this case a 'Meets' outcome was given on the 12 Sep 2017). *Note: see below for a full list of status terms used in HAP*

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Can you explain the terms used in HAP – Health Assessments?

Value	Meaning
Assessment Status	
New	This is the default setting for this field. It essentially means that there is no indication that medicals have been started and/or been received for this applicant.
Pre Exam	An eMedical clinic has searched for and managed this applicant's health case. It is now in their inbox for processing.
Exams in Progress	An eMedical clinic has completed the preliminary administrative steps within eMedical for the applicant's health case (e.g. uploaded photo and checked identity) and has now started to process at least one exam for the applicant (e.g. Chest X-ray).
Auto Clear Denied	Health case has already been completed and submitted, but the case has failed auto clearance rules in HAP – Health Assessments. These cases can be processed by MMSP administrative staff or will be referred to a MOC.
On hold admin	A MMSP health-processing officer has put this case on hold.
Sent to MOC	Case has been referred to a MOC for an assessment.
On hold MOC	This case has been put on hold by a MOC.
Awaiting application	For cases, which have been front-end, loaded, a MOC will not proceed to make an opinion as to whether or not the person meets the health requirement until a valid visa application is lodged.
Application Received	An application has subsequently been lodged and linked to the health case previously "Awaiting Application" and contains 'Paper' exams and awaiting MMSP health processing officer action.
Awaiting Assessment	A health case has a paper component and examinations are being re-used, the MMSP health processing officers will retrieve the paper files and complete the assessment.
Not required	HAP has determined that no health examinations are required for the applicant - given their circumstances/declarations at the time.
Sent for Processing Onshore	An offshore user (e.g. VPO at Post), has indicated that the case is not eligible for 'local clearance' and as such, has been "Sent for health processing onshore", to be assessed by a MOC.
Defer	More information, such as a specialist report or further tests, is needed before the MOC can provide an opinion.
SMOC Review	A MOC has provided a Does not Meet Opinion and the case is now with a Senior MOC (SMOC) for review.
Does Not Meet	The applicant has not met the health requirement and a visa cannot be granted unless a health waiver is available and exercised.
Return to MOC	A Senior MOC has sent a Does Not Meet opinion back to the MOC to re-consider.
Compactus Defer or Compactus	This case has been deferred and paper examinations have been filed in the compactus, pending receipt of additional medical information.
Auto Cleared	The health case has passed auto clearance rules and has automatically been finalised.
Recommend Cleared	The MMSP health processing staff have not identified any health concerns, and recommend the health case be cleared.
Locally Cleared	A VPO has made a decision that the applicant meets the health requirement in line with Local Clearance guidelines
Deferred	More information, such as a specialist report or further tests, is needed before the MOC can provide an opinion.

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Value	Meaning
Referred to Clinic	Onshore health cases Deferred for additional 600 series examinations are referred to State and Territory Health Clinics (STHCs) to be completed.
Meets	A MOC has determined the applicant has met the health requirement.
Meets with Comments	A MOC has determined the applicant has met the health requirement and sent comments for the VPO.
Meets with Undertaking	A MOC has determined the applicant has met the health requirement subject to the applicant providing the VPO with a signed 815 undertaking form.
Does Not Meet	A MOC has determined the applicant has not met the health requirement.
No Clearance Required (NCR)	A MOC has indicated that an applicant is not a threat to public health.
NCR with Undertaking	A MOC has indicated that an applicant must sign an 815 undertaking form due to potential public health issues.
NCR – Auto	The health case has passed auto clearance rules and has been automatically finalised.
NCR– Admin	The MMSP health processing staff have not identified any public health concerns, and recommend the health case be cleared.
NCR – VPO	The VPO has not identified any public health concerns, and recommends the health case be cleared.
Health not completed	This health case has been closed because the applicant did not complete their health examinations or the case was created in error.
<u>Waiver Status</u>	
Waiver Must Be Considered	A MOC had determined the applicant did not meet the health requirement and a health waiver is available and must be considered.
Sent to Immigration Health	A VPO has uploaded a health waiver submission into HAP – Health Assessments and sent to Immigration Health for a recommendation on whether a health waiver is supported or not.
Waiver Supported	Immigration Health has recorded their recommendation indicating that a health waiver is supported.
Waiver not supported	Immigration Health has recorded their recommendation indicating that a health waiver is not supported.
Waived	A VPO has recorded the delegate's decision to waive the health requirement.
Not Waived	A VPO has recorded the delegate's decision not to waive the health requirement.
AAT Remit	A VPO has recorded the AAT direction that the applicant meets the health requirement in HAP – Health Assessments.
<u>Undertaking Status</u>	
Required	The applicant is required to sign an 815 health undertaking form.
Form sent	The applicant has been sent the 815 health undertaking form.
Form received	A completed and signed 815 health undertaking form has been received by Home Affairs from the applicant.
Arrived	The visa holder on a health undertaking has now arrived in Australia.
Primary non-compliant	Visa holder who has failed to contact the Health Undertakings Service (HUS) within 28 days of arriving in Australia as required.
Interim compliant	Visa holder called HUS but could not be allocated to a clinic as they were departing Australia shortly.
Interim non-compliant	Visa holder who advised HUS they could not attend a clinic due to an imminent departure from Australia, but failed to depart as advised. Case now requires further management.
Primary Non-Compliant - Uncontactable	The visa holder failed to contact HUS and HUS have been unable to contact the visa holder despite attempts to do so on at least 3 occasions.

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Value	Meaning
Allocated to clinic	Visa holder has been referred to a clinic and no outcome has been recorded yet.
Appointment Attended	Visa holder has attended an appointment but is yet to be discharged. Visa holders are not considered Compliant with their Health Undertaking until they have been discharged from a State/Territory Clinic.
Clinic follow up required	Visa holder has failed to advise Home Affairs whether they attended their appointment.
Departed	Visa holder was allocated to a clinic but then departed Australia.
Compliant	Visa holder has complied with their health undertaking obligation.
Secondary noncompliant	Visa holder has been recorded as failing to attend their clinic appointment, but Home Affairs has not yet recorded as "non-compliant".
Non-compliant	Visa holder who Home Affairs has recorded in HAP- Health Assessments as "non-compliant" and need to be sent a non-compliance letter and placed on MAL.
Inactive	The visa holder has been given a subsequent MOC opinion that has superseded the health undertaking.
Undertaking Administratively Closed	Visa holder is no longer required to comply with their Undertaking as: <ul style="list-style-type: none"> • new medical information has been received and a new MOC opinion will be provided; • visa holder has received a subsequent 'unconditional' health clearance; • Visa holder has since become an Australian citizen.
<u>Departure Health Check (DHC) Advice</u>	
* This applies to all 200 subclasses except subclass 202.	
Cleared to travel	DHC has been completed and the visa holder is fit to travel without any special arrangements.
Cleared to travel with Escort	DHC has been completed and the visa holder is cleared to travel with an Escort. Note: This only applies to subclass 202 visa holders in which case the Escort costs are the responsibility of the sponsor and a MOC/ Home Affairs financial delegate is not required to consider the escort request. The sponsor's approval needs to be obtained before the DHC is finalised with this outcome.
* Escort Requested	DHC provider identifies the need for an Escort and request Home Affairs consideration and approval. Note: This is not a final outcome.
* Escort clinically supported and approved	MOC supports the Escort on clinical grounds and the financial delegate has approved this. Note: The escort request requires clinical support of a MOC and approval of a Home Affairs financial delegate for the Escort travel costs.
* Escort clinically not supported	A MOC does not support the need for an Escort on the basis that an Escort is not necessary i.e. travel should proceed without Escort.
* Escort Not Approved	The financial delegate does not approve request for an Escort (clinically supported).
Travel deferred - MOC	The MOC does not support travel. The visa holder's condition may require stabilisation before future travel.
Travel deferred - Clinic	DHC provider decides not to proceed with the planned travel based on the visa holder's condition.
DHC Not Completed	DHC provider is unable to complete the DHC for any number of reasons.

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What does the action panel allow me to do?

- Create a [New assessment](#) on the health case
- [Manage health case](#) to allow access to other functions such as:
 - [extend health clearance validity](#)
 - [recording paper medical results](#)
 - [Uploading of any health related attachments](#)
- View action history – This allows you to audit the health case and see what has happened at various steps of the process.

How can I tell why a health case failed auto clearance?

VPO's have the ability to view in HAP – Health Assessments why a health case has failed the HAP's auto clearance rules. This information can be found under Auto-clear failed details under the Current health case information. **Note:** Health cases with an assessment status of 'Auto clear denied' or 'Sent to MOC' require assessment by a person and are not finalised outcomes.

Client Checks	
Is this Health Case linked to a Visa application?	Yes
Does the client have a previous Does Not Meet opinion?	No
Does the client have Identity concerns?	No

Auto-clear failed details

- Rule Id 10020 - Medical Exam - Abnormal, Present or Yes value detected.
- Rule Id 10036 - Health Case has Expired Exams.

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How do I find all the health correspondence that has been generated for the HAP ID?

Correspondence generated during the process of a health case assessment may include any 884 MOC opinion correspondence generated for the applicant, including Waiver regulations.

The System Links panel within the Health Case Details section will let you know the TRIM container that has been used to store any health related correspondence and health case attachments, including blood reports and x-rays

s. 47F(1)

Health Case Details

Client Personal Details

Title -
 Family Name TEST
 Given Name/s Client
 Sex FEMALE
 Date of Birth 01 Jan 1980
 Preferred language -
 Interpreter required -
 Advised departure -

Health Case Details

Source system ICSE
s. 47F(1)
 Batch number -
 Process Type Electronic
 Priority Normal
 Health case type Onshore
 TB risk Level Higher

Visa Details

Processing Centre -
 Subclass/type 417 - WORKING HOLIDAY
 Stream -
 Assessment Period 1 year
 Visa status -
 Intended length of Stay 12 month(s)
 Cumulative stay in Australia -

System Links

TRIM Communications **BCC2017/41352**
 TRIM - Paper medicals box -
 TRIM - Film x-rays box -
 Movement History [Portal Link](#)
 CMAL [Portal Link](#)

Client Information: TEST, Client, FEMALE, 01 Jan 1980
IME Summary: Status Finalised, Clearance expires 15 Sep 2018
Health Alerts: Previous DNM ***
Type: 417 - WORKING HOLIDAY Assessment, Temporary (1 yr)
Assessment Status: Meets 15 Sep 2017

Waiver processes in HAP – Health Assessments

Where a MOC has provided a Does Not Meet outcome on a health case, and a health waiver is available, VPO's at the EL1 or above level must give careful consideration as to whether a health waiver should be exercised. VPO's are required to prepare the relevant health waiver submission template to document and record their decision. All health waiver submissions must be attached in HAP – Health Assessments for reporting purposes. For detailed instructions on processing a health waiver in the HAP, refer to the [Managing health waivers](#) tip sheet on the intranet.

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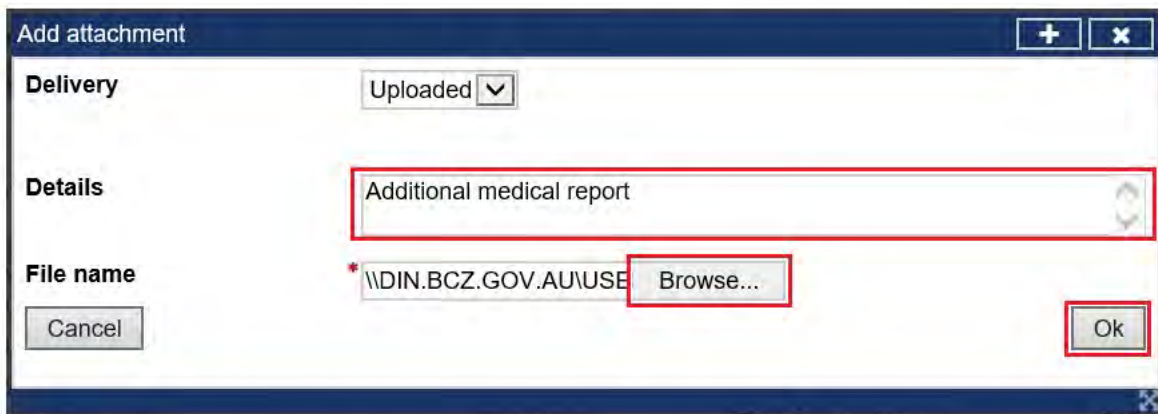
How do I upload extra attachments into HAP – Health Assessments?

To upload any additional health related attachments onto the health case, you will need to:

1. Search for the health case in Health Assessments
2. Select **Manage Health Case** in the Action panel and press the **Confirm** button.
3. Scroll to the bottom of the health case.
4. Click **'Add attachment'**



5. Fill in the **Details** of the attachment, **Browse** your computer for the file and press **Ok**



6. The attachment will display successfully attached to the health case under the **Attachments** panel.



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How do I extend the validity of an applicant's health clearance?

In line with the Health Requirement Procedural Instruction, VPO's can, in certain situations, extend the validity of an applicant's health clearance. VPO's should only extend a health clearance in exceptional circumstances and after careful consideration of health policy, and should not just provide an extension automatically. VPO must use the functionality in HAP – Health Assessments to extend the validity of an applicant's health clearance. If extension of a health clearance is available under policy, however the VPO is unable to provide the extension in HAP – Health Assessments, VPO's should contact s. 47E(d) to investigate.

1. Search for the health case in HAP - Health Assessments
2. Select **Manage Health Case** in the Action panel and press the confirm button.
3. Scroll to the bottom of the health case.
4. Press the **Extend** button next to current assessment.

Current Health Case

Client Checks

Is this Health Case linked to a Visa application? No
 Does the client have a previous Does Not Meet opinion? Yes
 Does the client have Identity concerns? No

Examinations

Examinations	Status	Exam. Date	Service Provider	Grade	Source	s. 47F(1)	Audit	View
Medical Examination	Expired	13 Oct 2014	Mr Doctor TESTING Central Health Testing Clinic	A Grade	eMedical		Audit	Q
Chest X-ray Examination	Expired	13 Oct 2014	Mr Radiologist TESTING Central Health Testing Clinic	A Grade	eMedical		Audit	Q

Current Assessment

s. 47F(1)	Assessed	Expires	Actioned By	Centre	Outcome	View	Extend
	13 Oct 2014	13 OCT 2015	HAPLOAD	Australian Service Provider	ACLR(4005)	Q	Extend

Previous Assessment

No Previous Health Assessments

The *Extend Assessment Expiry* window will appear.

5. The Assessment Expiry Date will automatically default to an additional 6 months when you complete the process and you must select one of the two assessment extension reasons listed below.

Note: Details are required if you are selecting compelling and compassionate reasons for the extension reason.

Extend Assessment Expiry

Assessment Current Expiry Date: 13 Oct 2015

Assessment Extension Reason: **Delays in processing not caused by visa applicant**

Details: **Compelling or compassionate reasons**

Buttons: Cancel, Ok

6. Press the **OK** button. The expiry date on the current assessment will now have been updated + 6 months to reflect the extension that you have just actioned.

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s. 47F(1)

Current Health Case

Client Checks

Is this Health Case linked to a Visa application? Yes
 Does the client have a previous Does Not Meet opinion? Yes
 Does the client have identity concerns? No

Examinations

Examinations	Status	Exam. Date	Service Provider	Grade	Source	Re-used from	View
Medical Examination	Expired	13 Oct 2014	Mr Doctor TESTING Central Health Testing Clinic	A Grade	eMedical	s. 47F(1)	q
Chest X-ray Examination	Expired	13 Oct 2014	Mr Radiologist TESTING Central Health Testing Clinic	A Grade	eMedical		q

Current Assessment

s. 47F(1)	Assessed	Expires	Actioned By	Centre	Outcome	View
	13 Oct 2014	13 APR 2016	HAPLOAD	Australian Service Provider	ACLR(4005)	q

An updated expiry date will also be sent to CSP and the visa processing system:

- In ICSE - a new event will be added reflecting the new expiry date

Event	Qualifier	Effect Date	Record Date	Client Name	Information
MAL Check	CMAL Potential Match	02/12/2015	02/12/2015	TEST, Client	Yes, AMBER, 2015-12-02T13:41:42.608+11.
Finalised Health Requirement	Auto Cleared	14/10/2015	14/10/2015	TEST, Client	149971, 13/04/2016

- In IRIS - the expiry date will simply be updated (i.e. overridden) with the new expiry date

```

Additional HAP Information
HAP Outcome: T - Auto Cleared           System: E
Health Asmt Expiry: 05-FEB-15         ID Concerns: N   MOC Comments: N
                                       Waiverable:     Undertaking:
-----
F1  F2  F3  F4  F5  F6  F7  F8  F9  F10 F11 F12 SEND
INFO MARK PGUP PGDN SCHED HELP EXIT HAP
HWVR UNDR ORIDE REQ HELPS
    
```

Note: HAP – Health Assessments will also display the following information on the 'View Previous Assessment' window:

- Extension reason
- Name of the officer requesting the extension
- Date the extension was actioned
- The new expiry date

View Current Assessment

s. 47F(1)

- Pre Exam
- 501 Medical Exam - Full Report
- 502 Chest X-Ray Exam - Full Report
- Decision - Auto Cleared
- Assessment History

s. 47F(1)

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Health Undertakings

If a health undertaking is required, it will be displayed in the department's visa and health processing systems. It will also be indicated in the 'Form 884' MOC opinion that is generated.

Note: An undertaking is required for all *Meets with Undertakings* outcomes. Undertakings can also be requested for *Does Not Meet* opinions and *No Clearance Required* opinions. This will be displayed on the 884, but is also shown in the HAP – Health Assessments and in CSP under the 'Undertaking Required' field.

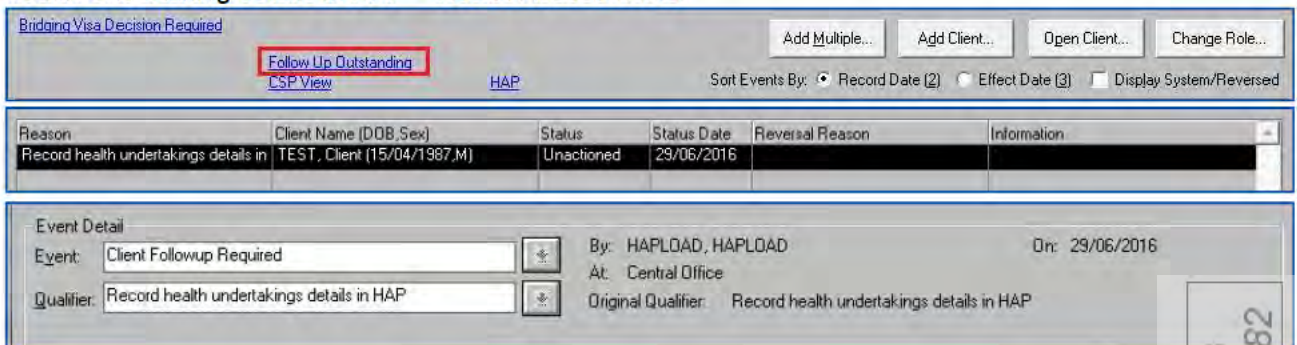
- In CSP: the *Undertaking Required* field will display **Yes**.



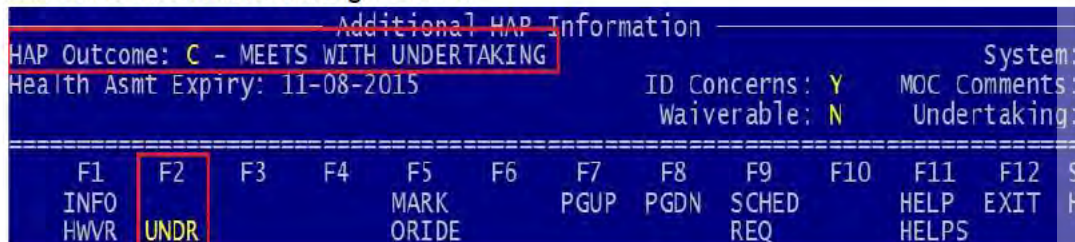
- In HAP – Health Assessments: the status bar on the left of the screen will display **Required** in the **Undertaking Status** panel.



- In ICSE: A 'Follow up outstanding' event will display to remind the officer that they are required to record Health Undertaking details in HAP – Health Assessments.



- In IRIS:
- You will not be able to grant until all information is recorded in HAP – Health Assessments
- A 'C' code 'Meets with Undertaking' will display as in the health code field on the visa processing screen and in HAP – Health Assessments.
- More detailed information about the undertakings process can also be viewed by pressing F2 to access the Health Undertakings screen.



Recording the 815 Health Undertaking Form in HAP

VPO's need to ensure that the applicant is provided with a copy of 815 Health Undertaking form. Once the applicant has signed and returned the 815 Health uUndertaking form, VPOs will need to update HAP – Health Assessments with the following:

- Scanned/Signed copy of 815 form
- The date the 815 Health Undertaking form was sent
- The date the 815 Health Undertaking form was received
- Also, ensure ICSE/IRIS is updated with the most up to date contact information for the client – this will assist with the undertaking process onshore.

1. Search for the health case in Health Assessments
2. Select **Manage undertaking** in the Action panel and press the **Confirm** button

The screenshot shows a light blue 'Action' panel with the following options:

- No action chosen
- New assessment
- Manage health case
- Manage undertaking
- View Action History

 A red box highlights the 'Confirm' button in the bottom right corner.

3. The *Manage Undertaking* screen will appear which allows you to record undertaking form details in HAP – Health Assessments.
4. Scroll to the bottom of the screen and select **Record undertaking form details** in the Action panel.
5. Record the **Date Sent** – This is the date that the 815 Form was sent to the applicant and the **Date Received** – This is the date that the applicant signed and returned the completed 815 form

The screenshot shows a form titled 'Record undertaking form details'. It includes the following fields:

- Required**
- Date**: 17 Nov 2020
- Status**: Required
- No selection made
- Change status
- Record undertaking form details
- Date Sent:** 17 Nov 2020 (with a calendar icon)
- Date Received:** 17 Nov 2020 (with a calendar icon)
-
-
-

 A red box highlights the 'Date Sent' and 'Date Received' fields.

6. Select **Attach Form 815** to upload a copy of the completed / signed Form 815

This screenshot is identical to the previous one, showing the 'Record undertaking form details' screen. A red box highlights the 'Attach Form 815' button.

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7. Once the signed Form 815 has been uploaded, select the **Confirm** button.

Action

Required

Date 17 Nov 2020

Status Required

No selection made

Change status

Record undertaking form details

Date Sent: 17 Nov 2020

Date Received: 17 Nov 2020

FORM 815 ALREADY ATTACHED, PLEASE SEE THE ATTACHMENT PANEL

Cancel Confirm

8. The Undertaking status for the health case will be updated

Success

Undertaking details recorded successfully

Undertaking Status

Form received 17 Nov 2020

ICSE case - The health outstanding event in ICSE will be finalised with the qualifier 'Meets with Undertaking-Form Received'. No further action is required to be undertaken. The Record health undertakings details in HAP follow up event will also be automatically finalised.

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IRIS case - will be updated to reflect that undertaking processing has been completed and you will be able to proceed to visa finalisation.

```
(IR191-V#59.02) - HAP UNDERTAKING INFORMATION -
Family Name: TEST Given Names: CLIENT
Over-riden:
Undertaking Required: Y
Undertaking Sent: Y Date (DD-MM-YYYY): 20-03-2015
Undertaking Received: Y Date (DD-MM-YYYY): 20-03-2015
```

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How do I create a New Assessment ?

Please ensure you have assessed all factors before proceeding with creating a new assessment. If you incorrectly create a new assessment, please contact s. 47E(d) for assistance.

To create a New assessment you need to:

1. Navigate to the *Case Search* screen and enter the applicant's HAP ID then press **Search**. The *Health Case Details* screen will appear.
2. Scroll to the bottom of the health case and select the correct **New Assessment** option for the case that you are managing from within the Action panel.

Note: more detailed instructions for each option are provided below.

1. Request a new assessment against a different regulation

Applicant's health clearance has been assessed against the wrong regulation (PIC) and the VPO requires the MOC to re-assess their health case to provide a new MOC opinion against a different PIC.

- a) Select the regulation that you want the health cases to be assessed against from the drop down list

Note: only valid PICs listed in the regulations for the relevant visa subclass will appear.

- b) Press the **Confirm** button

Note:

- **If the health case is electronic:** the case will automatically be Sent to the MOC for re-assessment and no further action is required by the officer to facilitate this.
- **If the health case is paper:** the case will be updated to a status of Awaiting Assessment. Please note that the Migration Medical Services Provider (MMSP) will be unable to re-assess the case until they obtain any required health examination reports that need to be considered. MMSP (Bupa) will arrange to obtain these reports themselves directly or via Immigration Health Branch (IHB). No further action is required by the officer to facilitate this (unless paper files are held by the visa officer).

IME Summary
Status Outstanding
Next step Medical officer to assess
Type 417 - WORKING HOLIDAY
Assessment Status Sent to MOC 27 Jun 2016

IME Summary
Status Outstanding
Next step Case being prepared for Medical officer
Type 417 - WORKING HOLIDAY
Assessment Status Awaiting Assessment 27 Jun 2016

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2. Organise for the applicant to complete repeat health examinations

The VPO requires the applicant to undergo repeat health examinations as their previous ones have or are about to expire on the visa being processed. The VPO will have access to this if:

- Health case is expired
- Health case will expire within 6 months
- Health case is not a DNM or No Clearance Required (NCR) outcome

Note: HAP will generate standard exams and therefore, you must ensure that all required exams have been generated in line with policy. If examinations are missing, please contact s. 47E(d)

a) Press the **Confirm** button

b) You will be promoted with a message to confirm you would like to create a new assessment, to proceed press **Ok**.

c) Once the new assessment has been created, you will see that the Assessment Status will have been updated to New.

Note: the applicant can now be provided with the same HAP ID and they will be able to attend a panel clinic to complete their repeat set of health examinations.

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3. Request a new assessment based on additional medical information being received

The applicant was given an outcome, but the visa officer has since received new **medical** information that a MOC needs to consider and provide a new opinion.

Note: Do not create a new assessment if the applicant has only provided **non-medical** information. If the visa officer is unsure whether the information provided is medical in nature please contact s. 47E(d) before proceeding any further.

- a) Scan the additional information the visa officer received (if the visa officer did not already receive it electronically) and press the **Add Attachment** button

- b) The visa officer will be prompted with a message to confirm the attachments the visa officer is attaching is new "Medical Information" that the MOC has not already seen. **Note:** This action cannot be undone - please ensure you would like to create new assessment based on new Medical Information.

- c) **Browse** to find and attach the attachment and press **OK**. The visa officer will be returned to the previous action panel

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d) Press **Confirm** button

Action

No action chosen
 New assessment
 Manage health case
 View Action History

Information

Document HIV test report.pdf attached, Continuing will create an assessment.

New assessment reason

Organise for the client to complete repeat health examinations
 Request a new assessment based on additional medical information being received
 Study/work in health care

Confirm

Attachments

Filename	View	Result	Delivery	Arrived	Details	Associated exam	Date Attached
Glasgow01922.dcm	View	Uploaded		Yes		502 - Chest X-ray Examination	14 Sep 2015
alf.jpg		Uploaded		No			27 Apr 2016
HIV test report.pdf		Uploaded		Yes			27 Jun 2016

Note:

- **If the health case is electronic:** the case will automatically be Sent to the MOC for reassessment and no further action is required by the visa officer to facilitate this – with the attachment now attached under the attachments panel.
- **If the health case is paper:** the case will be updated to a status of Awaiting Assessment. MMSP will be unable to re-assess the case until they obtain any required health examination reports that need to be considered in conjunction with any new **medical** evidence that the visa officer has attached in HAP or sent through to MMSP as per normal arrangements. MMSP (BUPA) will arrange to obtain these reports themselves directly or via IHB. No further action is required by the visa officer to facilitate this (unless paper files are held by the visa officer).

Message + x

Important: This action cannot be undone. Please make sure that you require the client to complete repeat health examinations for this visa application because their health clearance has expired before proceeding.

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4. Request a new assessment for a different assessment period

The visa officer requires a MOC to re-assess a case for a different assessment period – e.g. because the visa officer intends to grant the visa for a shorter period than they were originally assessed for.

Note: This is relevant for cases where the MOC provided a DNM opinion. If the applicant received a DNM when completing permanent health examinations for a temporary visa, you MUST request a reassessment for the correct period of stay that you intend to grant the visa for.

a) Enter the assessment period you wish the applicant’s health case to be re-assessed for.

Note: the permanent assessment period box will only appear checked where the correct set of permanent health examinations has been completed by the applicant.

b) Press Confirm button

The screenshot shows a web form titled "Action". It contains the following elements:

- Radio button options:
 - No action chosen
 - New assessment
 - Manage health case
 - View Action History
- Section: "New assessment reason"
 - Request a new assessment based on additional medical information being received
 - Request a new assessment for a different assessment period
- Section: "Assessment Period"
 - Permanent
 - Years: 0
 - Months: 6
- Button: "Confirm" (highlighted with a red box)

Note:

- If the health case is electronic: the case will automatically be Sent to the MOC for re-assessment and no further action is required by the visa officer to facilitate this
- If the health case is paper: the health case will be updated to a status of Awaiting Assessment. MMSP will be unable to re-assess the health case until they obtain any required health examination reports that need to be considered in conjunction with any new medical evidence that the visa officer has attached in HAP or sent through to MMSP as per normal arrangements. MMSP (Bupa) will arrange to obtain these reports themselves directly or via IHB. No further action is required by the visa officer to facilitate this (unless paper files are held by the visa officer).

The screenshot shows a "Message" dialog box with the following content:

- Header: "Message"
- Text: "Important: This action cannot be undone. Please make sure that you require the client to complete repeat health examinations for this visa application because their health clearance has expired before proceeding."
- Buttons: "Cancel" and a close button (X) in the top right corner.

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5. Request a new assessment as the applicant intends to study/work in health care

The applicant is intending to work as (or study to be) a doctor, dentist, nurse or paramedic, but failed to declare this when they applied for their visa/submitted their My Health Declarations form. Consequently, their health case does not currently contain all the required health examinations (i.e. medical, x-ray and blood tests).

Note: If the health case has any exam that is "Finalised Incomplete" that exam will be re-added to the case.

- a) Select **Study/work in health care** option from **New assessment** reason and press **Confirm** button

- b) Once the new assessment has been created, you will see that the Assessment Status will have been updated New.
- c) The additional health examinations that are required will also have been added to the health case.
Note: the applicant can now be provided with the same HAP ID and they will be able to attend a panel clinic to complete their outstanding set of health examinations.

IME Summary

Status
Outstanding

Next step
Health to be undertaken

Type
500 - Student (Temporary)

Assessment Status
New 27 Jun 2016

Examinations								
Examinations	Status	Exam. Date	Service Provider	Grade	Source	Re-used from	View	
HIV test	Required	-		-	-	-	b, p, e, a	
Hepatitis B test	Required	-		-	-	-	b, p, e, a	
Hepatitis C test	Required	-		-	-	-	b, p, e, a	
Medical Examination	Finalised	09 Jun 2016	Dr Automation Team Automation Clinic	A Grade	Paper	-		
Chest X-ray Examination	Finalised	09 Jun 2016	Dr Automation Team Automation Clinic	A Grade	Paper	-		

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When do I need to seek assistance to create a new assessment?

There are still scenarios where a new assessment may be required but visa officers will not be able to create a new health assessment in HAP – Health Assessments themselves, refer to the Health Requirement Procedural Instruction.

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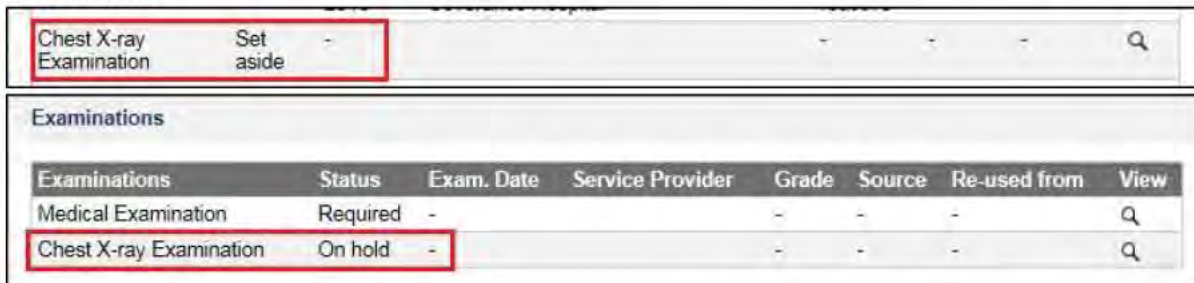
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How can I find out if an applicant has declared pregnancy at the time of IME?

1. Search for the health case in HAP - Health Assessments
2. Scroll to the bottom of the screen to view the **Current Health Case** examinations that the applicant completed for their IME assessment.

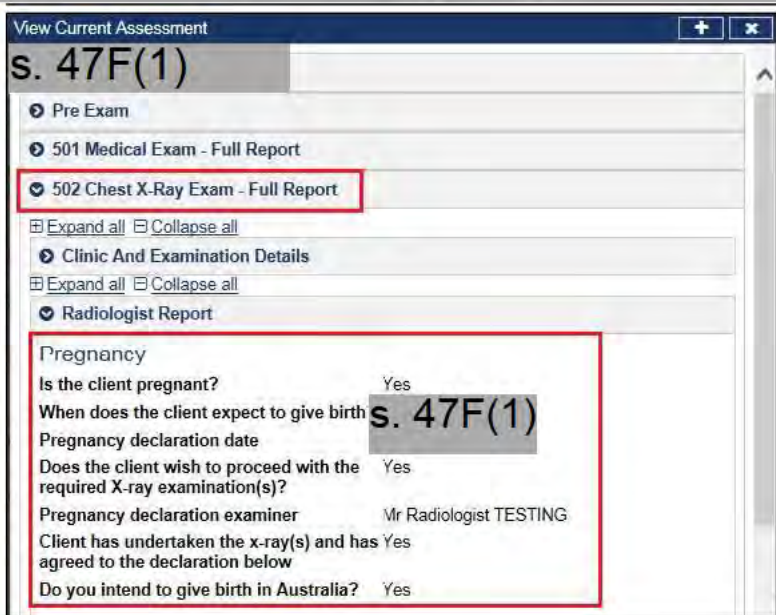


3. If the status of the 502 (Chest x-ray examination) is **Set aside** (Lower TB risk applicants) or **On Hold** (Higher TB risk applicants), this confirms that the applicant was pregnant at the time of the IME health assessment.



4. The visa officer can also view the HAP ID assessment to confirm the pregnancy declaration on the 502 provided by the applicant at the time of IME.

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For Official Use Only**How can I find an applicant's polio vaccination status?**

To determine which applicants are required to present a polio certificate and for further information regarding polio requirements refer to the Health Requirement Procedural Instruction.

For electronic cases

1. Search for the health case in HAP - Health Assessments
2. Scroll to the bottom of the screen to view the Current Health Case examinations that the applicant completed for their IME assessment.
3. You can press the view magnifying glass on the 951 Vaccination examination to view any details recorded by the panel physician or any attachments added

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4. Alternatively the clinic may have recorded this information in the 501 Medical examination general supporting comments. You can press the view magnifying glass on 501 Medical examination to view this information.

Note: Any attachments attached to the health case can be found under the attachments panel.

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**For paper cases**

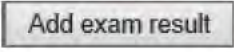
Check the panel physician's responses in the Form 26, particularly any notes regarding polio vaccination certificates.

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How do I record Hepatitis B paper results?

As per the Health Requirement Procedural Instruction, the visa officer is required to record Hepatitis B results that have been received for a pregnant visa applicant in Australia.

1. Search for the health case in HAP - Health Assessments
2. Scroll to the bottom of the screen and press **Manage Health Case** in the Action panel and press the **Confirm** button.
3. Press the 'edit pencil icon'  to edit the Hepatitis B test result.
4. Record the details of the examination result as below and press **OK**.

5. Upload the Hepatitis B scanned results by pressing on the  button under attachments.

6. Press the **Add Link** button 

7. Select the **Associated Exam** and **Results** Hepatitis B and press **Save**

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8. **Browse** the file to be uploaded and press **Ok** to upload the Hepatitis B results

Add exam result

Delivery: Uploaded

Link to exams:

Delete	Associated Exam	Result	Description	Edit
	708 - Hepatitis B test	Hepatitis B test		

Details:

File name: Browse...

Cancel Ok

9. The results will then be uploaded into the **Attachments** panel.
10. Proceed to locally clear the results or send to onshore for processing to the MMSP as per the Health Requirement Procedural Instruction.

Note: Steps to locally clear or send onshore for processing can be found within tip sheet '*Processing paper health examinations in HAP*' on the [intranet](#)

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