Standard Operating Procedure (SOP) 14
MBMMC Advocacy Program:
Training, Accreditation, and Governance

Based on the updated 11019NAT Course requirements, the VETS Act 2025

1. PURPOSE AND SCOPE

1.1 Purpose

The primary purpose of this Standard Operating Procedure (SOP) is to provide a formal framework for **Military Brotherhood Military Motorcycle Club (MBMMC)** members seeking to become accredited Advocates. MBMMC is an established **Ex-Service Organisation (ESO)**. The objective of our advocacy program is to:

- **Assist and support veterans and their families**, primarily through the provision of professional compensation and/or wellbeing advocacy.
- Ensure all MBMMC nominees represent the Club professionally and uphold the highest standards of veteran welfare in line with the **Department of Veterans' Affairs (DVA)** expectations.
- Provide a clear pathway for members to obtain the skills necessary to assist clients with claims, connect families to support services, and provide representation before the **Administrative Review Tribunal (ART)**.
- Facilitate the mandatory **sponsorship and indemnity insurance (VITA)** requirements for all active practitioners.

1.2 Scope

The scope of this SOP applies to **all MBMMC members nationally** who wish to undertake training or act as Wellbeing or Compensation Advocates. It governs the following areas:

- The internal **nomination and suitability assessment** of candidates.
- The **enrolment process** for the 11019NAT Course in Military Advocacy through the partner Registered Training Organisation (RTO), Major Training Services.
- The management of **workplace-based training** and mentorship within MBMMC Sub-Branches.

- The **centralised coordination by MBMMC National** for adding qualified advocates to the national Accredited Advocate Register.

2. LEGISLATIVE AND REGULATORY FRAMEWORK

2.1 Veteran Support Legislation

MBMMC Advocates operate within a shifting legal landscape. As of **1 July 2026**, the **Veterans' Entitlements, Treatment and Support (Simplification and Harmonisation) Act 2025** (the **VETS Act**) has significantly altered how claims are processed.

- **Harmonised Framework:** The VETS Act closes the *Veterans' Entitlements Act 1986* (VEA) and the *Safety, Rehabilitation and Compensation (Defence-related Claims) Act 1988* (DRCA) to new claims.
- **The Amended MRCA:** All new claims for service-related injuries, diseases, or deaths are now managed under an amended version of the **Military Rehabilitation and Compensation Act 2004 (MRCA)**.
- **Grandparented Rights:** Advocates must still maintain knowledge of "grandparented" entitlements for veterans who had claims accepted under the VEA or DRCA prior to the 2026 harmonisation date.

2.2 Merits Review and Tribunals

The framework for appealing DVA decisions has been modernised to provide a more streamlined review process:

- **Administrative Review Tribunal (ART):** Effective from **March 2025**, the ART replaced the Administrative Appeals Tribunal (AAT) as the body responsible for independent merits review.
- **Veterans' Review Board (VRB):** The VRB remains the first level of external review for many DVA decisions.
- **Advocate Representation:** Accredited Level 3 Advocates represent clients at the VRB, while Level 4 Advocates are required for representation before the ART.

2.3 Vocational Education Standards

The training and accreditation of MBMMC Advocates are governed by national vocational standards to ensure high-quality, consistent advice for the veteran community:

- **2025 RTO Standards:** All training and assessments delivered by Major Training Services (MTS) must comply with the **2025 Standards for Registered Training Organisations**.
- **National VET Regulator:** The program is overseen by the **Australian Skills Quality Authority (ASQA)** to ensure the 11019NAT course meets national competency requirements.

2.4 Privacy and Ethics

- **Privacy Act 1988:** Advocates are legally bound by the **Privacy Act 1988** and the **Australian Privacy Principles (APP)** regarding the handling of veteran personal and medical information.
- **ATDP Code of Ethics:** All trainees and practitioners must abide by the **ATDP Code of Ethics**.
- **Academic Integrity:** In line with 2025 RTO requirements, MBMMC maintains a strict policy against **Plagiarism** and the unauthorised use of **Generative AI** in completing assessments.

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3. 11019NAT COURSE STRUCTURE

3.1 Overview

The **11019NAT Course in Military Advocacy** is a nationally accredited, competency-based training program. It is designed to provide MBMMC members with the specific skills required to support veterans and their families through two distinct training streams: **Rehabilitation and Compensation** and **Wellbeing**.

3.2 Rehabilitation and Compensation Stream

This pathway focuses on assisting clients with claims for service-related injuries or diseases and representing them in merits review processes.

Unit Code	Unit Title	Prerequisite	Nominal Hours
NAT11019001	Provide military rehabilitation and compensation advocacy services under supervision	Nil	40
NAT11019002	Provide military rehabilitation and compensation advocacy services (Autonomous)	NAT11019001	80
NAT11019003	Advocate for a merits review of a primary decision (VRB/Reconsiderations)	NAT11019002	110
NAT11019004	Advocate before the Administrative Review Tribunal (ART)	NAT11019003	80

3.3 Wellbeing Stream

This pathway focuses on connecting veterans and their families with government and community-based services and support.

Unit Code	Unit Title	Prerequisite	Nominal Hours
NAT11019005	Provide military wellbeing advocacy services under supervision	Nil	40
NAT11019006	Provide military wellbeing advocacy services (Autonomous)	NAT11019005	80

3.4 Training Levels and Practice Points

The course structure provides defined entry and exit points for practitioners:

- **Level 1 (Entry Level):** Completion of NAT11019001 or NAT11019005 allows a member to practice as a Level 1 Advocate, provided they work under the supervision of a mentor.
- **Level 2 (Autonomous):** Allows an advocate to manage standard claims or wellbeing cases independently.
- **Level 3 & 4 (Specialist):** Advanced levels for compensation advocates who wish to represent veterans in legal and tribunal environments.

3.5 Volume of Learning

The total nominal duration for the full course is **530 hours**, which includes:

- **Supervised Learning (430 hours):** Comprising eLearning, face-to-face consolidation, and workplace-based training under an MBMMC mentor.
- **Unsupervised Learning (100 hours):** Comprising self-study, research, and the application of skills within the Sub-Branch environment.

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4. INTERNAL NOMINATION CRITERIA AND ELIGIBILITY

4.1 Baseline Eligibility Requirements

To be considered for nomination as an MBMMC Advocate, a member must meet the following baseline requirements:

- **Membership Standing:** The nominee must be a current financial member of MBMMC in good standing, with no outstanding disciplinary matters and a demonstrated adherence to the Club's values and Code of Conduct.
- **Service Background:** Preference is given to veterans, current serving members, or first responders. Non-service members may be considered if they have a demonstrated history of supporting veterans and their families.

- **Commitment to Welfare:** The nominee must show a genuine interest in veteran wellbeing and a willingness to volunteer time to assist the community.

4.2 Suitability and Personal Qualities

Advocacy requires a specific temperament and interpersonal skillset. Sub-Branch Executives will assess nominees against the following criteria:

- **Communication Skills:** The ability to listen actively, communicate clearly, and explain complex entitlements in a calm, respectful manner to clients who may be experiencing trauma or frustration.
- **Professional Conduct:** Demonstrated reliability, punctuality, and respect for client boundaries and privacy.
- **Emotional Stability:** The capacity to manage emotionally challenging conversations and the awareness of personal limits to avoid burnout.
- **Conflict of Interest:** The ability to maintain neutrality and avoid any conflicts of interest that could impact the quality of advocacy.

4.3 Knowledge and Technical Requirements

Nominees must possess the basic capabilities required to complete the accredited course:

- **Administrative Skills:** The ability to complete forms accurately and use email, online portals, and case-note systems.
- **Willingness to Learn:** A commitment to completing all ATDP training modules and a readiness to be mentored by experienced practitioners.
- **LLN and Digital Capability:** Demonstrated language, literacy, numeracy, and digital skills appropriate to the role.

4.4 The Internal Nomination Process

MBMMC employs a formal multi-stage process for endorsing advocates to ensure professional standards are met:

1. **Expression of Interest:** The member submits a completed **MBMMC Advocacy Nomination Form (Template provided in Annex A)** to their Sub-Branch Executive. This form is used to capture the applicant's service background, their motivation for seeking the role, and their digital capability.
2. **Suitability Assessment:** The Sub-Branch Executive conducts an interview to assess the candidate's readiness and suitability for welfare work, recording their recommendation in **Section E of the Annex A form**.

   Upon completion of local vetting and sign-off by the Sub-Branch Executive (Section E), the Annex A Nomination Form shall be submitted to the National Welfare Officer for National Endorsement (Section F), ensuring a copy (cc) is provided to the State President for regional oversight.

3. **National Endorsement:** The nomination must be reviewed and endorsed by the **National Welfare Officer** (or designated National Executive representative) using **Section F of Annex A** to ensure national consistency and strategic allocation of training places. National Executive will inform the member,

   Upon completion of the Section F review the National Executive shall advise the Candidate, Sub-Branch President, and State President of the outcome regarding the endorsement or decline of this application.

4. **Formal ATDP Submission:** Once the Annex A form has been fully authorised by both the Sub-Branch and National, the authorised MBMMC representative submits the formal nomination through the ATDP portal.

4.5 Grounds for Declining Nomination

The MBMMC National Executive reserves the right to decline a nomination if the member fails to meet eligibility requirements, lacks the necessary interpersonal skills, or has unresolved personal issues that may be exacerbated by advocacy work.

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5. ENROLMENT AND MANDATORY ENTRY REQUIREMENTS

5.1 The Enrolment Window

Once a member has been formally nominated through the ATDP portal by MBMMC National, they will receive an automated email containing a unique link to their online application form.

- **Mandatory Timeframe:** Nominees must access the link and complete their enrolment form **within 28 days**.
- **Automatic Deletion:** Failure to complete the form within this window will result in the nomination being automatically deleted from the system, requiring the member to restart the internal MBMMC nomination process.

5.2 Unique Student Identifier (USI)

A verified **Unique Student Identifier (USI)** is a mandatory requirement for all students undertaking nationally recognised vocational training in Australia.

- **Validation Requirement:** The personal details provided on the ATDP enrolment form (specifically Full Name and Date of Birth) **must match exactly** with the identification document used to register for the USI. If these do not match, the USI cannot be validated, and the enrolment will not progress.
- **MTS Verification:** The RTO will verify the USI through the national Student Management System before enrolment is confirmed. MTS will not issue any Statement of Attainment without a verified USI.

5.3 Language, Literacy, and Numeracy (LLN) Assessment

To ensure advocates have the necessary skills to effectively assist veterans, all trainees must demonstrate an elementary level of LLN capability. Candidates have two options to meet this requirement:

- **Option 1 (Prior Qualification):** Provide a USI transcript or certificate for a previously completed qualification at **Certificate III level or higher**.
- **Option 2 (LLN Quiz):** Complete a short, multiple-choice LLN assessment quiz provided by MTS, which typically takes approximately 15 minutes.

5.4 Digital Capability

As the 11019NAT course relies heavily on eLearning and digital portals, nominees must complete a **Digital Skills Questionnaire**. This assessment ensures the candidate has the basic digital literacy required to navigate the ATDP Portal, participate in online training, and manage electronic veteran case files.

5.5 Acknowledgement of Rights and Responsibilities

Before submitting the enrolment form, the nominee must declare that they have received and read the **MTS Candidate Handbook**. This handbook outlines the student's rights, responsibilities, and the academic integrity policies (including Generative AI and Plagiarism policies) they must abide by throughout their training.

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6. TRAINING DELIVERY AND WORKPLACE MENTORING

6.1 Mixed Delivery Mode

The 11019NAT course is delivered via a **mixed mode of training**, which ensures that MBMMC Advocates develop both theoretical knowledge and practical, hands-on skills. This blended approach is designed to produce practitioners who are competent in real-world veteran support environments.

The three primary pillars of delivery are:

- **External Delivery (Self-Paced eLearning):** Learners must complete self-paced eLearning modules delivered through a dedicated learning management system to build their foundation knowledge.
- **Internal Delivery (Consolidation):** Before undertaking formal assessment, learners participate in consolidation training and revision sessions. These sessions are conducted either face-to-face in a classroom or via an online classroom platform.
- **Workplace-Based Delivery:** Practical training and the application of skills are conducted within the learner's MBMMC Sub-Branch.

6.2 The Role of the Workplace Mentor

Workplace-based training is a mandatory component of the program. Every MBMMC trainee **must be guided by an experienced practitioner acting as a Workplace Mentor**.

- **Appointment:** Mentors must be experienced and qualified Advocates appointed by MBMMC.
- **Supervision:** The Mentor provides supervised practice, assists with the revision of ESO-specific skills, and ensures the trainee adheres to professional standards.
- **Digital Mentorship:** As the 11019NAT course and the DVA Advocacy Register are now entirely digital, the Mentor must provide assistance with navigating the **ATDP Portal** and electronic case-note systems for members who may struggle with digital capability.
- **Continuous Guidance:** The Mentor guides the trainee through a structured learning program, ensuring they are prepared for the complexities of veteran advocacy.
- **Verification:** The Mentor is responsible for verifying and signing off the **Workplace Experience Logbook (Annex B)** to confirm the trainee's practical performance before any application for local authorization (Gate 2) is considered.

6.3 Workplace Experience Logbook

All workplace-based learning activities must be recorded in a **Workplace Experience Logbook (template provided in Annex B)**. To protect veteran client privacy under the Privacy Act 1988, Annex B is structured into two distinct parts:

- **Part 1 (Attestation Summary Sheet):** A non-confidential administrative summary capturing candidate details, total practical hours logged, total client contacts, performance milestone check-offs, and mentor attestation.
- **Part 2 (Confidential Activity Log & Evidence):** Detailed case notes, client interaction logs, and claim evidence. Inspection is strictly restricted to the Trainee, Appointed Workplace Mentor, and RTO Assessor.

Overall the purpose of the Workplace Experience Logbook is to record:

- **Evidence of Performance:** The logbook serves as critical evidence to demonstrate consistent performance in workplace conditions or simulated conditions that replicate the workplace.
- **Assessment Requirement:** MTS Assessors will review the Workplace Experience Logbook to gather evidence of the trainee's competency before awarding a Statement of Attainment.
- **Trainee and Mentor Responsibility:** It is the trainee's responsibility to maintain an accurate and up-to-date logbook. The appointed Workplace Mentor is responsible for verifying and signing off the logbook entries to confirm practical performance before any application for local authorisation (Gate 2) is considered.
- **Alignment with SOP 29 Reporting (Charity Compliance):** To prevent administrative duplication, the data captured in the logbook—specifically **"Hours" and "Number of Contacts"**—must be recorded in a format that allows it to be ported directly into the **Quarterly Welfare Activity Report (SOP 29, Annex F).** This

ensures that workplace training evidence contributes directly to the Sub-Branch's national charity compliance and ESO reporting obligations.

6.4 Training Timeframes

To ensure advocates maintain momentum and that their training remains current with legislative changes, trainees generally have **twelve (12) months** to complete their chosen unit of competency via the training pathway.

6.5 Resources and Facilities

- **Course Materials:** Learners will be provided with electronic copies of all course materials relevant to their level of training.
- **Technology Requirements:** As the course relies on digital capability, trainees attending face-to-face sessions are encouraged to bring their own laptops to access online resources and manage electronic case files.
- **Training Environments:** Both actual and simulated work environments (including simulated Tribunal settings for Level 3 and 4) are essential for successful delivery and assessment.

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7. ASSESSMENT FRAMEWORK AND ACADEMIC INTEGRITY

7.1 Competency-Based Assessment (CBT)

The 11019NAT course is a nationally accredited Competency-Based Training (CBT) program. Trainees are not "graded" but are assessed as either **'Competent' (C)** or **'Not Yet Competent' (NYC)**. A Statement of Attainment is only issued once competency is achieved for a specific unit.

7.2 Assessment Methods

To demonstrate competency, trainees must provide evidence of both theoretical knowledge and practical application. Assessments include:

- **Knowledge Quizzes:** Open-book quizzes for each module to verify underpinning knowledge.
- **Practical Performance:** Evidence gathered from the **Workplace Experience Logbook (Annex B)**, post-interview action plans, and simulated or actual veteran interviews.
- **Skills Demonstrations:** Level 3 and 4 assessments require demonstrating representation skills in simulated or actual **VRB** or **ART** environments.
- **Assessor Interviews:** For Level 2 and above, an interview with an MTS Assessor is required to review documentary evidence produced during workplace experience.

7.3 Passing Requirements

- **Quiz Standard:** Trainees must achieve a minimum score of **80%** in each knowledge quiz to be deemed competent.

- **Evidence Standard:** Practical evidence must demonstrate consistent performance in accordance with the **2025 Standards for Registered Training Organisations**.
- **Outcome Notification:** MTS aims to advise trainees of their assessment results within **20 working days**.

7.4 Re-assessment and Appeals

- **Second Attempts:** At the sole discretion of the assessor, a trainee may be allowed a **second attempt** at specific questions or tasks to reach the 80% threshold.
- **Third Attempts:** Under no circumstances is a third attempt permitted.
- **Wait Period:** If competency is not achieved after the allowed attempts, the trainee cannot re-attend an assessment session for **six (6) months**.
- **Appeals:** Trainees have the right to appeal an assessment decision, starting with a discussion with the original assessor followed by a formal request for re-marking.

7.5 Plagiarism Policy

MBMMC maintains a zero-tolerance policy for plagiarism, defined as presenting work copied in whole or in part from another person or source without proper acknowledgment.

- **Own Work:** All quiz answers and assessment products must be the trainee's own work.
- **Consequences:** Proven plagiarism may result in an NYC result, a requirement for a supplementary task, or a mandatory **6-to-12-month suspension** from the program.

7.6 Generative AI Policy

In accordance with the 2025 MTS standards, the use of **Generative Artificial Intelligence (AI)** tools to produce, modify, or complete assessments is strictly **prohibited**.

- **Permitted Use:** AI may only be used to support general research or idea generation.
- **Detection:** MTS reserves the right to verify submissions using direct questioning and AI detection tools to confirm the authenticity of the trainee's work.

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8. TRANSITION AND RECOGNITION OF PRIOR LEARNING (RPL)

8.1 Overview of RPL and Credit Transfer

MBMMC recognises that many members possess significant existing skills and knowledge acquired through prior formal training, military service, or years of volunteer advocacy. **Recognition of Prior Learning (RPL)** is an assessment process that allows these members to gain credit toward the 11019NAT qualification without repeating training for skills they already possess.

8.2 Transitioning from the Legacy TIP System

Members who were formally trained as Pension or Welfare Officers under the legacy **Training Information Program (TIP)** system are eligible to undertake a transition process through RPL.

- **Entry Level:** The RPL process is specifically designed to facilitate the transition of experienced TIP practitioners directly to **Level 2** (Autonomous) in either the Compensation or Wellbeing stream.
- **Prerequisites:** Practitioners seeking Level 3 or 4 accreditation must first obtain their Level 2 Statement of Attainment through this transition process.

8.3 Evidentiary Requirements for RPL

To be deemed competent via RPL, a member must provide a portfolio of evidence that demonstrates they currently meet the national standards. In accordance with the **2025 RTO Standards**, this evidence must be authentic, valid, and current. Evidence may include, but is not limited to:

- **Training Records:** Copies of certificates or transcripts from TIP courses and other relevant vocational qualifications.
- **Workplace Products:** Records of client interviews, communications, and post-interview action plans.
- **Case Files:** Copies of submitted DVA claims, supporting documentation, and analysis of decision letters.
- **Advanced Representation:** For those seeking Level 3 or 4, records of cases represented at the **VRB** or **ART**, including case strategies and Statements of Issues.

8.4 Credit Transfer

Where a member has previously completed identical units of competency (e.g., from the superseded 10620NAT course) and holds a **Statement of Attainment**, they may be eligible for a direct **Credit Transfer**.

- Members must provide a verified **USI Transcript** to Major Training Services to have these prior units recognised.
- Credit Transfer is a separate administrative process from RPL and does not require the submission of a workplace portfolio.

8.5 MBMMC's Role in Supporting RPL Applications

To ensure a successful transition for our most experienced members, MBMMC National and Sub-Branches will provide the following support:

- **Mentorship:** Experienced advocates will assist candidates in identifying and compiling relevant evidence from their past casework.

- **Verification:** Sub-Branch Presidents may be required to provide a written statement verifying that the evidence provided in a member's RPL portfolio is a true and accurate reflection of their work within the Club.
- **Privacy Oversight:** The Sub-Branch must ensure that any client files used as RPL evidence have been managed through the preferred **written consent** method or appropriate redaction.

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9. PROFESSIONAL STANDARDS AND ETHICS

9.1 ATDP Code of Ethics

All MBMMC Advocates, including trainees, are required to abide by the **ATDP ESO Advocate Code of Ethics**. This commitment involves:

- **Professionalism:** Conducting oneself in a manner that upholds the reputation of MBMMC and the broader ex-service community.
- **Dedication:** Committing the necessary time and effort to effectively assist veterans and their families.
- **Accountability:** Breaches of the Code of Ethics are taken seriously and may result in a member being removed from the training program or having their MBMMC authorisation revoked.

9.2 Privacy and the Australian Privacy Principles (APP)

Advocates deal with highly sensitive personal, medical, and financial data. Under the **Privacy Act 1988**, MBMMC and its Advocates are legally responsible for maintaining the privacy of all information provided by veteran and dependant clients.

- **Third-Party Disclosure:** Private information that allows an individual to be identified must never be passed to a third party without the specific, written consent of that individual.
- **Data Security:** MBMMC requires all advocates to maintain accurate and secure records in accordance with national governance standards.

9.3 Privacy of Veteran’s Information for Assessment

A unique ethical challenge arises during Level 2, 3, and 4 training, where real client case files must be viewed by an MTS Assessor to verify competency. MBMMC practitioners must use one of the following two methods to manage this:

- **Method 1: Redaction.** Advocates must obscure or cover all identifying details in the documents provided as evidence. This includes names, addresses, contact details, bank account numbers, service numbers, and DVA file numbers.
- **Method 2: Consent (Preferred Method).** The Advocate obtains written consent from the veteran or dependant to use their records for assessment purposes. A specific ATDP Consent Form is available for this purpose.

- **Special Note: Workplace Experience Logbook -** Detailed client case logs and attached claim documentation in Part 2 of Annex B remain strictly confidential between the Trainee Advocate, Workplace Mentor, and RTO Assessor. Sub-Branches shall ensure Part 2 is maintained securely and never made accessible for general branch inspection or administrative review.

9.4 Generative AI Policy

In accordance with 2025 RTO standards and the Club's commitment to professional advocacy, MBMMC maintains a **zero-tolerance policy** regarding the unauthorised use of Generative Artificial Intelligence (AI).

- **Strict Prohibition:** The use of Generative AI tools (such as ChatGPT) to produce, modify, or complete assessment tasks, clinical case notes, or official DVA claims is strictly prohibited.
- **Rationale for Restriction:** Use is restricted due to the high risk of technical "hallucinations" or inaccuracies and the mandatory requirement for students to demonstrate their own professional competence to act as a practitioner.
- **Permitted Use:** AI tools may only be used as a support mechanism for general research or initial idea generation, provided the final submission remains the original work of the member.
- **Verification and Enforcement:** Major Training Services (MTS) and MBMMC National reserve the right to verify the authenticity of all submissions through the use of AI detection tools or direct questioning of the candidate.
- **Disciplinary Consequences:** Proven misuse of AI in assessments is classified as academic misconduct. Under SOP 14, Section 9.5, this may result in an immediate "Not Yet Competent" (NYC) result and a mandatory suspension from the MBMMC Advocacy Program for a period of 6 to 12 months.

9.5 Plagiarism and Academic Integrity

MBMMC maintains a strict policy against plagiarism, defined as presenting work copied from another participant, the internet, or any other source without proper acknowledgment.

- **Individual Work:** All assessment tasks and quiz answers must be the trainee's own work.
- **Consequences:** Proven plagiarism may lead to a "Not Yet Competent" result, a requirement for supplementary tasks, or a mandatory suspension from the program for **6 to 12 months**.

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10. ACCREDITATION AND THE ADVOCACY REGISTER

10.1 Issuance of Statement of Attainment

Accreditation is triggered by the successful completion of units of competency within the 11019NAT course.

- **Verification:** Upon being deemed competent, the RTO (Major Training Services) will issue a **Statement of Attainment (SoA)** within 20 working days.
- **Recording:** This achievement is recorded against the member's **Unique Student Identifier (USI)** and within the ATDP Student Management System.

10.2 Presidential Authorisation to Practice

Receiving a Statement of Attainment does not automatically authorize a member to provide services on behalf of MBMMC.

- **Written Authority:** On receipt of an SoA, the member must be **authorized in writing by their Sub-Branch President**.
- **Limitation of Practice:** This authorization only covers advocacy services up to the specific level for which the member has been trained (e.g., Wellbeing Level 1).
- **Insurance Validation:** This written authorization is a mandatory requirement for the member to be covered under the **VITA professional indemnity insurance** policy.

10.3 Centralised National Coordination

To ensure administrative consistency and data integrity, MBMMC **National coordinates all updates** to the national Accredited Advocate Register on behalf of Sub-Branches.

- **Authorised Persons:** MBMMC National nominates and maintains the two **"Authorised Persons"** (typically the National Treasurer and Senior Advocate) who have the formal authority to manage register entries with the DVA Advocacy Training Section.
- **National Submission Process:** Upon receiving and verifying a request from a Sub-Branch, the National Executive will formally notify the DVA Advocacy Training Section using the standard request format provided in **Annex D: Sample Letter (National to ATDP)**
- **Sub-Branch Submission:** Sub-Branches must not contact DVA directly to update the register. Instead, they must submit a completed Sub-Branch Registration Data Form (Annex C) **to their respective State President for endorsement**. The State President will then forward the endorsed form to the National Executive for processing.

10.3.1 Advocacy Register Administration The designated National Authorised Persons are responsible for the technical administration of the ATDP Advocacy Register (AR) on behalf of the Club. These officers must follow the specific system-entry protocols required by the Department of Veterans' Affairs to ensure register integrity, manage trainee enrolments, and verify practitioner CPD status. The detailed procedural steps for navigating the AR portal and fulfilling these national responsibilities are contained in **Annex E: National Authorised Person Operating Guide**

10.4 Mandatory Eligibility Declarations

For a Sub-Branch location or its advocates to be listed on the public register, the National Executive must provide a formal declaration to DVA confirming the following criteria have been met:

- **Membership Rule:** The Sub-Branch membership consists primarily of past/present ADF members and/or their dependants.
- **Primary Purpose:** The Sub-Branch is established primarily to provide compensation and/or wellbeing advocacy to veterans and their families.
- **"No Fees" Policy:** In accordance with MBMMC's charitable mission, all advocacy and claims services are provided free of charge to veterans and their families.
- **Website Pathway:** The Sub-Branch maintains a dedicated page on the national website that provides a clear, public pathway for veterans seeking support.
- **Safeguarding Confirmation:** The Sub-Branch certifies that valid state-specific **Working With Children (WWC)** and **National Police Checks** are held on file locally for every practitioner nominated for registration.

10.5 Register Maintenance and Auditing

- **Required Data:** When adding an advocate, National must provide their Full Name, **ATDP ID Number**, and current Qualification Level.
- **Operational Details:** National will also manage the public-facing contact details for each authorized ESO location, including physical appointment addresses and dedicated advocacy emails.
- **Annual Audit:** National will conduct periodic reviews to ensure the register accurately reflects active, financial, and authorized MBMMC practitioners.

10.6 Mandatory Governance Gates for Practitioner Authorization

In accordance with the **VETS Act 2025**, Sub-Branch Presidents must oversee a mandatory **four-gate process** to transition a member from trainee to authorized practitioner. This directive represents the **only recognized path** to maintaining professional standing and ensuring the validity of **VITA professional indemnity insurance**. Failure to strictly follow these administrative gates immediately invalidates insurance coverage and creates significant organizational liability.

- **Gate 1: Qualification and Training (11019NAT):** The member must successfully complete the nationally accredited **11019NAT Course in Military Advocacy** through the partner RTO, Major Training Services (MTS), and hold a valid Statement of Attainment.
- **Gate 2: Local Authorization:** The Sub-Branch President must conduct a physical audit of **Part 1 (Attestation Summary Sheet)** of the trainee's Annex B Logbook to verify mentor sign-offs and aggregated practical hours, and upon verification, issue a formal 'Written Authority to Practice'. Under no circumstances is the Sub-Branch President required or permitted to inspect client case notes or veteran files in Part 2.
- **Gate 3: National Notification (The Critical Link):** The Sub-Branch must submit the **Sub-Branch Registration Data Form (Annex C)** to the National Executive immediately, ensuring the **State President is copied** on the submission for jurisdictional oversight.

- **Gate 4: Activation and Register Entry:** The National Authorised Persons will complete the process by entering the practitioner into the **Accredited Advocate Register** and confirming their inclusion under the unified national VITA policy.

11. TRAINING ALLOCATION PRIORITIES

11.1 Objective of Training Allocation

Training places for the **11019NAT Course in Military Advocacy** are a valuable national resource funded by the Australian Government. MBMMC is committed to ensuring these places are allocated to provide the **"best possible return to the ex-service community"**. Members must understand that nomination is a strategic management tool used to ensure the Club meets its welfare obligations; it is not based solely on individual interest.

11.2 Key Prioritisation Criteria

When determining which members will be endorsed for training, the National Executive and Sub-Branch Executives will consider the following factors:

- **Sub-Branch Workload:** An assessment of the current and projected volume of compensation claims and wellbeing cases within a specific branch.
- **Advocacy Gaps:** Prioritising training in streams (Compensation or Wellbeing) or levels (1 through 4) where a Sub-Branch or region currently lacks accredited coverage.
- **Geographic Need:** Ensuring that advocacy services are accessible to veterans and their families across all authorised MBMMC Sub-Branches and locations.
- **Nominee Commitment:** Evaluating the nominee's demonstrated history of supporting veterans and their ability to commit the significant time required for both training and ongoing casework.

11.3 Managing Member Expectations

The nomination process is designed to support the **Club's collective mission** to assist and support veterans and their families.

- **Need-Based Selection:** Nomination is based on where MBMMC requires advocacy coverage most, ensuring that the Club remains a credible and responsive ESO.
- **Service to All:** Nominees must demonstrate a desire to provide advocacy services to **any member of the serving and ex-serving community**, regardless of whether they are a member of MBMMC.

11.4 National Oversight and Approval

To maintain national consistency and professional standards, the **MBMMC National Executive** maintains final authority over all training allocations.

- **National Coordination:** The National Welfare Officer will review all Expressions of Interest to ensure that the distribution of training places aligns with the Club's national service delivery model.
- **Workload Verification:** National will verify that a Sub-Branch's operational needs justify the addition of a new trainee before submitting the formal nomination through the ATDP portal.

11.5 Grounds for Deferral or Re-allocation

MBMMC National reserves the right to defer a member's training or re-allocate a training place if it is determined that:

- The Sub-Branch currently has sufficient accredited practitioners for its workload.
- Another branch has an urgent, un-met need for advocacy services.
- The nominee is unable to meet the 12-month completion timeframe for their unit of competency.

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12. VITA INSURANCE

12.1 Professional Indemnity Overview

The **Veterans' Indemnity and Training Association (VITA)** provides essential professional indemnity insurance for MBMMC Advocates. This coverage is funded by the Australian Government and is designed to protect both the practitioner and the Club during the provision of advocacy services to the veteran community.

12.2 Mandatory Eligibility for Coverage

To be covered by the VITA policy, an individual must strictly meet the following two criteria:

- **Qualified and Trained:** The member must hold a current Statement of Attainment for the relevant level of the **11019NAT** course.
- **Authorized:** The member must be a "suitably qualified, trained and authorised" member of MBMMC. Authorization must be provided **in writing by the Sub-Branch President**.

12.3 Scope of Coverage

The VITA policy provides protection for accredited advocates while they are performing their official duties. This includes coverage for:

- **Advice:** Giving advice to the ex-service community regarding DVA pension, compensation entitlements, and wellbeing support.
- **Client Meetings:** Accidents that occur during a formal meeting with a veteran or dependant client.

- **Work-Related Travel:** Accidents occurring while travelling to or from a client meeting.
- **Training Travel:** Accidents occurring while travelling to or from an authorized ATDP training program.

12.4 The Administrative Notification "Loop"

VITA insurance is only valid if MBMMC National can verify that a practitioner is authorized and active.

- **Sub-Branch Responsibility**: It is the mandatory responsibility of the Sub-Branch to notify MBMMC National in writing (using Annex C) **and to copy (cc) their respective State President on the submission** immediately upon a President authorising an advocate to practice. **This loop ensures jurisdictional oversight and valid professional indemnity coverage.**
- **National Responsibility**: MBMMC National will maintain the master register of all authorized advocates and ensure they are included under the Club's annual VITA coverage verification.
- **Insurance Invalidation**: Failure to follow this notification chain immediately invalidates professional indemnity insurance, creating significant personal and organizational liability.
- **Register Integrity Warning: National must be notified of any changes to the personnel list immediately. The DVA register enforces a 6-month inactivity logout; failure to maintain active data will result in the Sub-Branch's public visibility to veterans being terminated.**

12.5 Annual Fees and Renewal

MBMMC National pays an **annual fee** that covers all accredited and authorized MBMMC advocates nationally. This fee is managed centrally to ensure that coverage remains continuous and that all Sub-Branches are protected under a single unified policy.

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13. REVIEW AND GOVERNANCE

13.1 Responsibility for Governance

The **MBMMC National Executive** is responsible for the overarching policy, governance, and compliance of the Club's advocacy program. While Sub-Branches manage local operations and welfare support, the National Executive ensures that all advocacy activities align with the Club's **National Constitution**, the **ATDP Code of Ethics**, and Department of Veterans' Affairs (DVA) requirements.

13.2 Ongoing Monitoring and Evaluation

MBMMC's advocacy program is subject to ongoing monitoring to ensure its effectiveness and compliance with national standards:

- **External Oversight:** The Department of Veterans' Affairs is responsible for the formal monitoring and evaluation of the 11019NAT course during its accreditation period.
- **Internal Oversight:** MBMMC National will periodically review the performance of its advocates and the accuracy of the national register to ensure the Club maintains its credibility as a structured Ex-Service Organisation (ESO).
- **Student Feedback:** All MBMMC trainees are required to participate in course evaluation processes, such as the RTO Learner Questionnaire, to provide feedback on the quality of their training experience.

13.3 Annual SOP Review

To keep pace with the rapidly shifting legislative landscape and vocational standards, this SOP will be **reviewed on an annual basis**. Specific triggers for an immediate out-of-session review include:

- Amendments to core veteran legislation (e.g., updates to the **VETS Act 2025**).
- Changes to the **Standards for Registered Training Organisations (RTOs)**.
- Updates to the **11019NAT** course structure or assessment requirements.
- Directives from the **Administrative Review Tribunal (ART)** regarding representation.

13.4 Continuous Improvement

MBMMC is committed to the continuous improvement of its advocacy services. The National Welfare Officer will engage with the **ATDP National Training Manager** and the partner RTO's to ensure that MBMMC's internal nomination and mentoring processes remain aligned with industry best practices.

ADVOCACY NOMINATION FORM

SECTION A – APPLICANT DETAILS

- Full Name: _____
- Preferred Name / AKA: _____
- USI Number(if available): _____ Sub-Branch: _____
- Phone: _____ Email: _____
- Service Background (tick all that apply): [ ] Veteran [ ] Current Serving ADF [ ] First Responder [ ] Family Member [ ] Supporter (non-service)
- Years of involvement with MBMMC: _____

SECTION B – MOTIVATION & SUITABILITY

1. Why do you wish to become an Advocate? (Describe your interest in supporting veterans and families):

_____

_____

_____

2. What experience do you have working with veterans, families, or welfare matters?

_____

_____

_____

3. What personal qualities do you bring to the role? (e.g., communication, empathy, reliability, confidentiality):

_____

_____

_____

4. Are you able to commit the necessary time to complete your nominated training course / CPD package, undertake required practical casework/mentoring, and participate in ongoing professional development?
5. [ ] Yes [ ] No *Availability outline:*

_____

SECTION C – CAPABILITY & READINESS

1. Are you comfortable using email, online portals, and completing forms? [ ] Yes [ ] No
2. Are you willing to maintain accurate case notes and follow MBMMC reporting procedures? [ ] Yes [ ] No
3. Are you aware that advocacy work may involve emotionally challenging conversations? [ ] Yes [ ] No
4. Do you have any personal circumstances that may affect your ability to undertake advocacy work?
   (Answering "yes" does not automatically exclude you; it helps us support you.)
   [ ] Yes [ ] No *Details:*
   _____
5. What Course are you appling for: _____
6. Course Code (if applicable):_____

SECTION D – DECLARATION BY APPLICANT

I declare that the information provided is true and correct. I understand that advocacy requires professionalism, confidentiality, and adherence to MBMMC policies, and that nomination does not guarantee acceptance by ATDP.

Signature: _____ Date: _____

SECTION E – SUB-BRANCH ASSESSMENT (INTERNAL USE ONLY)

1. Membership Standing: [ ] Financial [ ] No disciplinary matters
   [ ] Meets Code of Conduct

2. Suitability Assessment:
   - Communication skills: [ ] Suitable [ ] Needs development
   - Reliability & conduct: [ ] Suitable [ ] Needs development
   - Emotional readiness: [ ] Suitable [ ] Needs development

3. Recommendation: [ ] Recommended for nomination [ ] Not recommended at this time

Sub Branch Assessor Name: _____ Position: _____

Signature: _____ Date: _____

SECTION F – NATIONAL ENDORSEMENT

National Welfare Officer / National Executive Representative:
Name: _____ Signature: _____
Outcome: [ ] Approved for ATDP Nomination Date: _____
[ ] Declined Date: _____

Informed of National Executive outcome:
[ ] Member
[ ] Sub-Branch President
[ ] State President

ATDP Registration Date:_____
Registering Authority
[ ] National Treasurer
[ ] Senior Advocate

WORKPLACE EXPERIENCE LOGBOOK TEMPLATE

This Workplace Experience Logbook contains confidential training records protected under SOP 14 (Section 9) and the Privacy Act 1988. Inspection of this logbook is strictly restricted to the Trainee, Appointed Workplace Mentor, and RTO Assessor.

Below is an example of a Workplace Exepeience Logbook:

PART 1: PRACTITIONER & MENTOR DETAILS

NOTICE: This summary sheet contains aggregated training evidence for administrative Gate 2 auditing. Detailed client case notes and daily activity logs are maintained in Part 2 and remain strictly confidential between the Candidate, Appointed Workplace Mentor, and RTO Assessor**.**

Section 1: Candidate & Mentor Profile

- Candidate Name: _____ ATDP ID/USI: _____
- Sub-Branch:_____ State:_____
- Training Stream: [ ] Compensation [ ] Wellbeing
- Target Level: [ ] 1 [ ] 2 [ ] 3 [ ] 4
- Appointed Mentor: _____ ATDP ID/USI: _____

Section 2: Practical Workplace Hours & Activity (NO CLIENT DATA)

- Period of Logged Activity: From: ___ / ___ / ___ To: ___ / ___ / ___
- Total Supervised Hours Logged: _____ Hours (Target: _____ Hours)
- Total Client Contacts / Interviews: _____ Contacts
- Total Claims / Action Plans Completed: _____ Units

Mandatory Performance Milestones Cleared (Mentor to tick):
[ ] Primary / Initial Client Interviews Completed
[ ] Claim Form Preparation / Action Pathways Executed
[ ] DVA Decision Analysis & Validation (Level 2+)
[ ] Post-Interview Action Plans & Client Follow-up Executed
[ ] Client Privacy & Redaction Compliance Verified (SOP 14, Sec 9.3)

Section 3: Workplace Mentor Attestation & Declaration

I, _____ (Mentor Name & AKA), being a qualified and active ATDP Advocate (ID/USI: _____), hereby certify that the Candidate named above has conducted all practical workplace activities under my direct supervision. I confirm that the candidate has satisfactorily met the required practical hours, casework standards, and ethical competencies in accordance with MBMMC SOP 14, the ATDP Code of Ethics, and RTO assessment guidelines.

Mentor Signature (Physical Ink): _____ Date: ____ / ____ / ____

Section 4: Sub-Branch President Gate 2 Audit & Local Authorisation

I, _____ (Sub-Branch President), certify that I have audited this Part 1 Attestation Summary Sheet and verified the Workplace Mentor's sign-off.

[ ] APPROVED — Written Authority to Practice Issued
Stream: _____ Level: _____

[ ] NOT APPROVED
Reason: _____
_____
_____

President Signature (Physical Ink): _____ Date: ____ / ____ / ____

Candidate Signature (Physical Ink): _____ Date: ____ / ____ / ____

PART 2: DAILY ACTIVITY LOG

Trainees must record every instance of supervised practice. This log serves as critical evidence for MTS Assessors to verify consistent performance in workplace conditions.

Date	Unit Code	Activity Description (e.g., Client Interview, Research, Claim Prep)	Time (Hrs)	Evidence Produced (e.g., Action Plan, Claim Form)	Mentor Initial

PART 3: MANDATORY PERFORMANCE MILESTONES

The candidate must demonstrate the ability to complete the specific quantity of tasks required for their level.

For Compensation Stream (L1/L2):

- [ ] Primary Interview 1 [ ] Primary Interview 2 [ ] Primary Interview 3
- [ ] Primary Claim 1 [ ] Primary Claim 2 [ ] Primary Claim 3 [ ] Primary Claim 4 [ ] Primary Claim 5
- [ ] Decision Analysis & Validation (L2 only)

For Wellbeing Stream (L1/L2):

- [ ] Wellbeing Interview 1 [ ] Wellbeing Interview 2 [ ] Wellbeing Interview 3
- [ ] Post-Interview Action Plan 1 [ ] Action Plan 2 [ ] Action Plan 3
- [ ] Implementation of Action Pathway [ ] Client Follow-up Conducted

PART 4: PRIVACY & ETHICS COMPLIANCE

- Redaction: I confirm that all names, addresses, and service numbers in attached evidence have been obscured.
- OR Consent: I have obtained written Client Consent using the ATDP form for these records to be used for assessment.

PART 5: CANDIDATE REFLECTION (SELF-CARE)

Briefly describe how you managed personal stress or potential burnout during these activities.

PART 6: MENTOR VERIFICATION

I, _____ (Mentor Name), certify that the activities recorded in this logbook were performed by the Candidate under my supervision and meet the required professional standards of MBMMC and the ATDP Code of Ethics.

Mentor Signature: _____ Date: _____

SUB BRANCH SUBMISSION CHECKLIST

This checklist ensures that Sub-Branches provide National with all mandatory information required by DVA to update the national Accredited Advocate Register.

SECTION 1: ELIGIBILITY DECLARATIONS
The Sub-Branch President or Secretary must tick all boxes to confirm eligibility for the National Register.

- [ ] Membership: Our membership consists primarily of past and present members of the ADF and/or their dependants.
- [ ] Primary Purpose: We are established primarily to provide compensation and/or wellbeing advocacy to veterans and dependants.
- [ ] No Fees: We do not charge any fee for the provision of claims or wellbeing services.
- [ ] Website Pathway: We maintain a dedicated page (on the national or local site) providing a clear public pathway for veterans seeking support.

SECTION 2: SUB-BRANCH (ESO) OPERATIONAL DETAILS
This information is required for the public-facing section of the Advocate Register.

- Sub-Branch Name: _____
- Postal Address: _____
- Appointment Location: _____
  (Physical address where veterans can meet with an advocate)
- Advocacy Email: _____
  (Dedicated email for appointment bookings/enquiries)
- Advocacy Phone: _____

SECTION 3: ADVOCATE(S) TO BE REGISTERED OR REMOVED
List all members who have received their Statement of Attainment and Presidential Authorisation.

Add/Delete	Full Name of Advocate	ATDP ID Number	Qualification Level (e.g., Wellbeing L1)**:**

SECTION 5: SUPPORTING DOCUMENTATION CHECKLIST
Please ensure the following items are attached to this form when sending to National.

- [ ] ABN Evidence: Proof of Sub-Branch Australian Business Number.
- [ ] Safeguarding Confirmation: We confirm that Working With Children (WWC) and National Police Checks are held on file locally for all advocates listed above.

SUB BRANCH EXECUTIVE AUTHORISATION

Sub-Branch Officer Name: _____ Date: _____

Signature: _____

Position: [ ] President
[ ] Secretary

SECTION 6: STATE PRESIDENT ENDORSEMENT
This section must be completed by the State President prior to submission to the National Executive.

I, _____ (Name), being the State President for _____[Insert State], have reviewed this registration request. I confirm that this update is consistent with the state-level advocacy strategy and support its submission to the National Executive for formal register processing.

State President Name: _____ State: _____

Signature: _____ Date: _____

SAMPLE LETTER (NATIONAL TO ATDP)

This letter is to be sent by the National Executive (as the coordinating body) to the DVA Advocacy Training Section when there is change of a Sub Branch Advocate.

To: advocacy.training@dva.gov.au

Subject: Request to Register New Advocates – MBMMC **[Insert Sub-Branch Name]**

Dear ATDP Program Officer,

On behalf of the National Executive of the Military Brotherhood Military Motorcycle Club (MBMMC), I request that the following Sub-Branch be registered as an approved ESO location **or** have its personnel list updated **(strike out which does not apply).**

Formal Declaration of Eligibility.
In accordance with DVA requirements, I formally declare that this Sub-Branch meets the following criteria:

- Membership: **Consists primarily of past/present ADF members** and/or their dependants.
- Primary Purpose: Established to assist and support veterans and their families, and **primarily to provide compensation and/or wellbeing advocacy**.
- No Fees: **No fees are charged** for providing claims or wellbeing services.
- Website Pathway: **A dedicated page is maintained** on the national website providing a clear pathway for veterans seeking support.

ESO Operational Details

- ESO Name: **MBMMC**
- Sub-Branch: **[Insert Name]**
- ESO Postal Address: **[Insert Sub-Branch Address]**
- ESO Location (Appointments): **[Insert Physical Address for Appointments]**
- ESO Email (Appointments): **[Insert Sub-Branch Advocacy Email]**
- ESO Phone (Appointments): **[Insert Sub-Branch Advocacy Phone]**
- ESO Website: MBMMC Advocacy Web Page

Authorised Persons to Maintain Register
(*DVA requires two Authorised Persons to maintain the register and one Executive Officer for oversight):*

- 1st Authorised Person: **[Name] – [Email] – [Mobile] – [Position]**
- 2nd Authorised Person: **[Name] – [Email] – [Mobile] – [Position]**

Executive Officer Details

- Name: **[Insert Sub-Branch President/Secretary Name] – Email: [Insert Email]**

Advocate(s) to be Registered (or removed)

Add/Delete	Full Name of Advocate	ATDP ID Number	Qualification Level (e.g., Wellbeing L1)**:**

Supporting Documentation
Please find attached the following information:

- MBMMC ABN: 25 442 532 448
- Proof of ACNC status: Charity concession Status GST/Income/FBT as of 22 Jan 2024
- The MBMMC National Constitution (if changed from 5 May 2025 that has previously been supplied to ATDP).

We confirm that all state-specific safeguarding checks (WWC/Police Checks) are held on file.

Yours sincerely,

[Signature]]
[Name]
[National Executive Position]
Military Brotherhood Military Motorcycle Club

[Date]

NATIONAL AUTHORISED PERSON OPERATING GUIDE

E.1 Purpose of the Authorised Person

The **Authorised Person** is nominated by MBMMC National to manage the administration of trainees, advocates, and Club contact information on the **ATDP Advocacy Register (AR)**. This role serves as the single point of contact for the Department of Veterans' Affairs (DVA) to verify the Club's national advocacy capability.

E.2 Essential Administrative Tasks

National Authorised Persons must perform the following mandatory tasks:

- **Training Nominations:** Formally nominate new trainees or existing advocates for additional training or Recognised Prior Learning (RPL) via the portal.
- **Register Maintenance:** Add or remove advocates from the national register immediately as changes occur at the Sub-Branch level.
- **Six-Monthly Audits:** Log into the AR at least once every six months to confirm that all ESO contact details are correct and that the personnel list is current.
- **CPD Verification:** Review the **Continuing Professional Development (CPD)** status of advocates to ensure they remain eligible for a Letter of Authority and VITA insurance coverage.

E.3 System Access and Security

1. **Portal Login:** Access the AR via advocateregister.org.au by selecting **"ESO Login"**.
2. **Authentication:** Entry requires the registered mobile number and email address of the Authorised Person.
3. **Security PIN:** A unique PIN will be sent to the registered mobile phone to complete the secure login process.

E.4 Procedural Workflows

- **Nominating Trainees:** Before starting a nomination, ensure the candidate's **Unique Student Identifier (USI)**, full name, and email are available. You must select the correct pathway (**Training** or **RPL**) and read the **Nominator Declaration** before submission.
- **Authorising Practitioners:** To link a qualified advocate to the MBMMC register, you must enter their USI and the date their **Presidential Letter of Authority** was issued.
- **Removing Practitioners:** To protect the Club from liability, advocates who are no longer active or financial must be removed by selecting **"Remove From this ESO"** in the portal.

E.5 Mentor Management

The Authorised Person may use the portal to request external mentoring support for MBMMC trainees. This involves posting a request on the **Mentor Noticeboard** for specific units of competency where a local MBMMC mentor is unavailable.

F.1 NATIONAL ADVOCACY REGISTER CHECKLIST

Task	Description	Frequency	Completed (Date/Init)
Portal Data Audit	Login to the AR to confirm ESO contact details, physical appointment addresses, and emails are accurate.	**Every 6 Months**	
Personnel Validation	Verify that all listed Advocates and Trainees are currently active, financial, and authorised.	**Every 6 Months**	
Training Nominations	Process new nominations or additional Units of Competency (UoC) upon National endorsement.	**As Required**	
Register Updates	Add/Remove practitioners from the national register immediately upon notification from a Sub-Branch (Annex C).	**Immediately**	
CPD Review	Check the **Continuing Professional Development (CPD)** status of practitioners to verify eligibility for insurance coverage.	**Quarterly**	
Letters of Authority	Facilitate the issuance of the annual **ESO Letter of Authority** for each active and compliant advocate.	**Annually**	
Mentor Management	Review and respond to mentor requests or post new requests on the **Mentor Noticeboard**.	**Regularly**	
Information Conduit	Distribute relevant ATDP communications and legislative updates to practitioners and trainees.	**As Received**	

Operational Notes for Authorised Persons:

- **System Access:** Ensure you have your registered mobile phone and email accessible to receive the mandatory **Security PIN** for portal entry.
- **VITA Compliance:** Access to professional indemnity insurance (VITA) is contingent upon maintaining an accurate and current register of authorised practitioners.
- **Inactivity Warning:** Failure to log in and audit the register at least once every six months may lead to data becoming stale, which can delay Sub-Branch training applications and invalidate insurance coverage.

SUMMARY CHECKLIST FOR SUB-BRANCH PRESIDENTS

DOCUMENT PURPOSE AND AUTHORITY

This checklist serves as the master compliance instrument for Sub-Branch Presidents. Adherence to these "governance gates" is compulsory and represents the only recognised path to maintaining the Club's professional standing and ensuring the validity of VITA professional indemnity insurance.

PART I: CHARITY REGISTRATION & INCORPORATION CHECKLIST

Phase A: Pre-Application Requirements (Ref: SOP 25, SOP 10, SOP 2)

Before a Sub-Branch applies for charity status or begins formal operations, the following essential actions must be completed.

- [ ] Service Member Minimum: Verify a minimum of five (5) Service Members are committed to the Sub-Branch.
- [ ] "Do Not Admit" Verification: The President or Secretary must contact the National Secretary to verify all founding members against the National Database before applications are accepted.
- [ ] Safe Haven Alignment: Confirm 100% agreement on creating a "safe haven" for Mateship, Camaraderie, and qualified Veteran Support.
- [ ] Executive Formalisation (No "Double-Hatting"): Formally elect the Executive. The positions of President, VP, Secretary, and Treasurer must be held by four individual and differing Service Members.
- [ ] Physical Signature Mandate: Ensure all membership applications and founding documents are physically signed. IAW SOP 10, digital signatures are strictly prohibited.
- [ ] Operating Location: Secure a physical operating location (e.g., local RSL).

Phase B: The Application & Incorporation Process (Ref: SOP 25, SOP 10)

- [ ] State Incorporation: Apply for incorporation as a non-profit organisation within your specific State jurisdiction.
- [ ] Chain of Command Notification: Submit the application to the State President for forwarding to the National Secretary.
- [ ] Financial Setup: Upon incorporation, obtain an ABN and open a Sub-Branch bank account.
- [ ] Probation Entry: The six-month Sub-Branch probation period officially commences only after NEC ratification is confirmed in writing.

PART II: VETERAN ADVOCACY PROGRAM 'GATES' (Ref: SOP 14)

The Sub-Branch President must oversee this four-gate process to transition a member from trainee to authorised practitioner.

Gate	Requirement	Action / Metric
Gate 1	Qualification & Training	Successful completion of 11019NAT Course; must be guided by an ESO-appointed mentor.
Gate 2	Local Authorisation	President issues formal Written Authority to Practice, verified against the Annex B Logbook.
Gate 3	National Notification	CRITICAL: Notify National Executive in writing (Annex C) immediately. Copy the State President on the submission.
Gate 4	DVA Activation	Final administrative verification and entry into the MBMMC Accredited Advocate Register.

[CAUTION] AUDITOR CRITICAL WARNING: Failure to provide written notification (Gate 3) results in the immediate invalidation of VITA Professional Indemnity Insurance for that practitioner. This creates significant personal and organisational liability.

PART III: MASTER COMPLIANCE SUMMARY TABLE

Compliance Area	Reference	Required Action
Executive Structure	SOP 2 / 25	No "double-hatting" for the four primary Executive roles.
Member Suitability	SOP 10	"Do Not Admit" database check before onboarding.
Document Integrity	SOP 10 / 25	No Digital Signatures. All forms must be physical.
Financial Deadlines	SOP 2	Deposit all funds into the bank within 5 working days.
Reporting	SOP 25	Forward SITREPs and Minutes to National Secretary Quarterly.

PART IV: LEADERSHIP ATTESTATION

Sub-Branch Name: _____

President's AKA: _____

President's Signature: _____ **Date:** _____

(Note: Physical Signature Only — Digital Signatures are Invalid)

Concluding Statement: As Sub-Branch President, I acknowledge that adherence to these compliance "gates" is mandatory under the Club Constitution. These procedures protect the legal standing of the Sub-Branch, the professional integrity of our advocates, and the insurance protections provided to our members.