

National Disability Insurance Scheme (NDIS) Plan Review Guide



Date: _____

Name: _____





This Plan Review Guide will help you prepare for your scheduled NDIS plan review

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NDIS Plan Review Tool booklet is produced by Synapse.

Synapse is dedicated to improving the quality of life of people living with and affected by acquired brain injury.

Disclaimer:

While all care has been taken to ensure information is accurate, all information in this publication is only intended as a guide, and proper medical or professional support and information should be sought. Synapse will not be held responsible for any injury or damages that arise from the following information provided. Material within does not necessarily reflect the policies of Synapse or the staff and Board of Management. References to other organisations and services do not imply an endorsement or guarantee by Synapse.

The NDIS will review your plan every 12 months (potentially every 24 months for subsequent plans) or earlier if there is a significant change in your circumstances. These reviews are to see how you are progressing with your goals and make sure you're getting the support you need.

The answers you give to the following questions will provide helpful information to the NDIS upon which to discuss what has worked for you, what hasn't worked, and if you have any unmet needs you would like support with over the next 12 months.

When completing this Plan Review Tool it will be helpful to have the following information available:

- Copy of most recent NDIS approved plan
- Breakdown of funding spent and unspent NDIS funding (note – this can be accessed through the participant portal. Please refer to attachment A for instructions on how to find this information in the portal)
- Progress reports from treating allied health professionals (see attachment B for guidelines on required supporting documentation and Allied Health reports)
- Understanding of what is considered “reasonable and necessary” – see attachment C



If you need help completing this Plan Review Tool please discuss with either your Local Area Coordinator (LAC) or support coordination service if you have one.

Participant Name	
NDIS Number	
Nominee and relationship to participant (if applicable)	

About Me

Changes to where I live and the people who support me

If your current living arrangements or the people who support you have changed since your first plan, please provide details. This might include family and friends, your carer, your doctor, teachers, support providers, or others.

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My daily life and activities

Please provide details about your current daily or weekly routines and activities you attend or would like to attend, as these may have changed since your first plan. You may find it helpful to use this calendar to describe your weekly routine. Try not to leave any gaps and include things like watching TV or resting.

	MORNING	AFTERNOON	NIGHT
MONDAY			
TUESDAY			
WEDNESDAY			
THURSDAY			
FRIDAY			
SATURDAY			
SUNDAY			

My goals

Your current goal/s will be listed in your NDIA plan.

It is helpful to review these goals to decide if you wish to continue with the same goals from your previous plan, whether your goals have been achieved, or you may want to consider new goals for this plan.

Things to consider:

What are the things that are most important to you? Consider including these as priorities in your first and second goal

What would you like to change?

What would you like support with to increase your independence or build your capacity?

Do you need help to implement your NDIS Plan? If so, consider the need for support coordination as a goal.

Are there any new activities that you would like to try?

This list below may assist you to identify the different areas of your life that you would most like to include in your goals: (Tick your priority areas)

- daily life
 where I live
 relationships
 health and wellbeing
 learning
 work
 social and community activities
 choice and control over my life
 others _____

	YOUR GOALS	FAMILY MEMBERS, FRIENDS, SERVICES OR OTHERS WHO CAN HELP ME ACHIEVE MY GOALS
MY FIRST GOAL:		
MY SECOND GOAL:		
MY LONGER-TERM GOALS AND ASPIRATIONS ARE:		
GOAL 3		
GOAL 4		
GOAL 5		

My supports

To help prepare for your review, please list details of required supports in the relevant support categories below:

CORE SUPPORTS	CURRENT FUNDED SUPPORTS (Only what you currently receive)	UNMET NEEDS (Extra support you would like to receive)
<p>1/. Assistance with Daily Life Personal care; assistance with household tasks; preparation and delivery of meals (quote required); assistance in shared living arrangements and need for respite care (in-home or centre based).</p>		
<p>2/. Transport List supports and restrictions, e.g. receives mobility allowance; can't use public transport unassisted or at night; wears harness in car etc.</p>		
<p>3/. Consumables Eg. Continence (if applicable list how many continence products used daily). Also includes interpreting, translating, and home enteral nutrition (HEN) products - include low risk/low cost assistive technology.</p>		
<p>4/. Assistance with Social and Community Participation Support to engage in social or recreational activities within the community. For centre based support include details of day program(s) including service names, days and support hours.</p>		

CAPITAL SUPPORTS	CURRENT FUNDED SUPPORTS (Only what you currently receive)	UNMET NEEDS (Extra support you would like to receive)
<p>5/. Assistive technology All aids or equipment supports (including vehicle modifications) that assist you/your carer to live independently. Also includes related assessment, set-up and training in support items. Include equipment that needs servicing/replacement, and specify low risk assistive technology if required.</p>		
<p>6/. Home Structural home modifications (quotes required) and Specialist Disability Accommodation (SDA) for participants who require specialist housing solutions to assist with the delivery of supports that cater for their significant functional impairment and/or very high support needs. (Include any modifications that need replacement).</p>		
CAPACITY BUILDING SUPPORTS	CURRENT FUNDED SUPPORTS (Only what you currently receive)	UNMET NEEDS (Extra support you would like to receive)
<p>7/. Coordination of supports Assistance to strengthen your ability to connect to and coordinate informal, mainstream and funded supports in a complex service delivery environment.</p>		
<p>8/. Improved Living Arrangements Assistance to obtain/retain appropriate accommodation.</p>		

CAPACITY BUILDING SUPPORTS	CURRENT FUNDED SUPPORTS (Only what you currently receive)	UNMET NEEDS (Extra support you would like to receive)
<p>9/. Increased social and community participation</p> <p>Eg. tuition fees, art classes, sports coaching and similar activities that build your skills and independence. Other items or adjustments such as customised tools required because of your disability could be considered.</p>		
<p>10/. Finding and keeping a job</p> <p>Workplace assistance to assist you to successfully obtain and/or retain employment in the open or supported labour market. (Provide DMI level if supported employment.) Also includes school leaver employment supports.</p>		
<p>11/. Improved relationships</p> <p>Specialist assessment and support to address behaviours of concern.</p>		
<p>12/. Improved health and wellbeing</p> <p>Personal training, exercise physiology to support, maintain or increase physical mobility. Also includes specialist diet support.</p>		

CAPACITY BUILDING SUPPORTS	CURRENT FUNDED SUPPORTS (Only what you currently receive)	UNMET NEEDS (Extra support you would like to receive)
<p>13/. Improved learning Provision of skills training, advice, assistance with arrangements, orientation to assist a person with disability moving from school to further education.</p>		
<p>14/. Improved life choices Assistance to manage your funds through financial plan management (FPM).</p>		
<p>15/. Improved daily living skills Assessment, training, development and/or therapy to assist in the development of, or increase in skills for independence and community participation. (E.g. OT, Physio, Speech, Psychologist, Psychiatrist, Behavioural Therapist etc.)</p>		
<p>Other (List any other supports you currently receive or would like).</p>		

What has worked well in the implementation of your NDIS plan in the past 12 months

E.g. how has your NDIS plan helped you reach your goals

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What hasn't worked well for you in the past 12 months

E.g. lack of providers, challenges meeting your goals (include any reasons you have not been able to utilise allocated funds)

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Additional notes/ comments/questions

E.g. additional support you'd like help to access, any anticipated changes in circumstances

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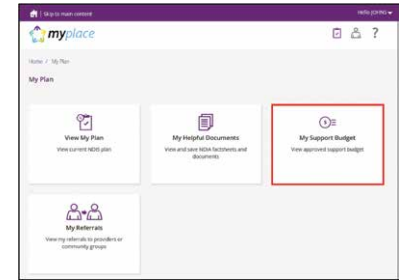
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Attachment A

Participant portal user guide: accessing funding breakdown

<https://www.ndis.gov.au/participant-portal-user-guide.html>



Attachment B

Allied Health/Therapists reports

If allied health professionals or therapists have or are providing support to you under your current plan, inform them that you are due for a scheduled plan review and that it is important for them to provide a progress report stating:

- the type of therapy they are providing, in detail
- the reason for the therapy
- specifically how that therapy has improved/built capacity for the participant during the current plan period
- specifically what that improvement/ built capacity will mean to the participant's ability to achieve their goals and /or greater independence in the future
- how often the therapy is required and the session duration e.g. once per week for one hour
- over what period of time the therapy is required e.g. 12 months
- the likely deficits both short term and long term that may result if this therapy regime is not applied now e.g. inability to achieve goals or build capacity, a higher cost for a longer period if the therapy was applied at a later life stage

Note – it is preferable that allied health reports are provided to the NDIS two (2) months prior to your plan review.

Other important information/ documents you can provide to assist the planner

- Allied health professional or therapist reports
- Medical reports
- Functional capacity reports (e.g. Autism spectrum DSM levels)
- Assistive technology (AT) reports
- Equipment quotes
- Work estimates / quotes

Note: If you don't have any additional documents, assessments or reports, don't be concerned; just speak with your Local Area Coordinator (LAC) or Support Coordination service who will assist and guide you.

Attachment C

Reasonable & Necessary Criteria

The NDIS provides reasonable and necessary supports that aim to assist people to live the life they want through building and maintaining independence and through participation in community, work and social activities.

There must be evidence that funded supports are likely to be effective and beneficial (good practice) and represent a reasonable cost in comparison to alternative support. Importantly, funded supports must relate to a person's disability and have a clear link to their goals. The NDIS does not fund supports that are seen as day-to-day living costs, that is, costs that everyone would incur regardless of whether they have a disability e.g. if a participant has a goal of getting fit by going to a gym, the NDIS may pay for the support or assistive technology the person requires to undertake this activity, however it is not the NDIS's responsibility to pay for a

person's gym membership itself. Before the NDIS can determine what is reasonable and necessary to fund we must first explore what can be provided by informal and other support systems. This is because the NDIS does not want to replace the positive natural supports a person has in their life (such as those supports provided by family, carers and friends); and because the NDIS is not responsible for funding supports that are already available through existing services, community groups or government departments (such as Medicare or the education system).

National Disability Insurance Scheme Act 2013 - SECT 34. Reasonable and necessary supports.

When making funding decisions, NDIA planners and delegates are bound by the 'NATIONAL DISABILITY INSURANCE SCHEME ACT 2013 - SECT 34. Reasonable and necessary supports'.

- (1) For the purposes of specifying, in a statement of participant supports, the general supports that will be provided, and the reasonable and necessary supports that will be funded, the CEO must be satisfied of all of the following in relation to the funding or provision of each such support:
 - a) the support will assist the participant to pursue the goals, objectives and aspirations included in the participant's statement of goals and aspirations;
 - b) the support will assist the participant to undertake activities, so as to facilitate the participant's social and economic participation;
 - c) the support represents value for money in that the costs of the support are reasonable, relative to both the benefits achieved and the cost of alternative support;
 - d) the support will be, or is likely to be, effective and beneficial for the participant, having regard to current good practice;
 - e) the funding or provision of the support takes account of what it is reasonable to expect

- f) the support is most appropriately funded or provided through the National Disability Insurance Scheme, and is not more appropriately funded or provided through other general systems of service delivery or support services offered by a person, agency or body, or systems of service delivery or support services offered:
 - (i) as part of a universal service obligation; or
 - (ii) in accordance with reasonable adjustments required under a law dealing with discrimination on the basis of disability.
- (2) The National Disability Insurance Scheme rules may prescribe methods or criteria to be applied, or matters to which the CEO is to have regard, in deciding whether or not he or she is satisfied as mentioned in any of paragraphs (1)(a) to (f).