

## The Planning Cycle & Review

An NDIS Plan has plan dates. This is the date that indicates when a review for the next plan will be.

NDIS generally will contact the participant or the Support Coordinator 4-6 weeks before that date so that the new plan can be built at the end date of the current plan.

<https://www.ndis.gov.au/understanding>

At the bottom of the page of this link are some booklets created by NDIS that can help you understand the planning cycle and plans.

There are 3 stages to a planning cycle.

### Plan creation and implementation

This is where the participant has a new plan, they will need support to connect to services that align with their goals stated in the plan.

You will need to work with the participant and their family to understand what they need and the right services to engage. This may include research and providing options for them.

You then make connections through referrals. You will need to have an understanding of how many hours each service will be needed over the life of the plan as this will be stated in their Service Agreements and will give everybody involved an understanding of the level of supports needed.

There may be connections needed to mainstream services also, such as a new GP, or a family support service.

Request copies of the Service Agreements for your records.

It is helpful if there are lots of services to create a budget for the plan that will help the participant and family understand how the funding will be distributed.

## Monitoring of the services and provision

This period of the planning cycle involves liaising with the participant to see how the services are going. Are they happy with all the providers?

Are there providers that aren't assisting them to reach their goals?

Do they feel empowered in their lives?

It is best to contact participants regularly to check in, as you may find that their circumstances change and you will have to assist them to connect with NDIS and alert them of a change of circumstances or application for an unscheduled review. This is necessary when a participant's plan no longer meets their needs.

It is helpful to collect data across the life of the plan such as 3 monthly checking of goals. Are the participant's goals changing, are they moving closer to their goals. There are helpful resources of the Team section of the CASOP website that can assist with this. This helps you gather information for when you are preparing for the Review.

Other areas the participants may need support:

- Monitoring their funding
- Connecting with NDIS
- Questions re their plan or NDIS
- Further connections to services

<https://www.ndis.gov.au/understanding/supports-funded-ndis>

<https://www.ndis.gov.au/understanding/supports-funded-ndis/reasonable-and-necessary-supports>

## Planning for Review

This involves:

- Contacting all providers and service's and requesting their report/ assessments and recommendations for review

- Having discussions with the participant about their new plan and discussing any new goals they may need included in the new plan
- Review assessments/reports /recommendations and preparing your CoS Report
- Emailing all documentation including your report to enquiries@ndis.gov.au with the participants name, DOB & NDIS # . Attention it to the planner if you know who it will be. Email it with enough time for the planner to prepare also

Also, have a look on the CASOP website at resources there, as there is further information on the planning cycle.

## THE NDIS REVIEW

There are different types of Reviews.

### SCHEDULED REVIEW

A scheduled review is as stated above, a review that is planned and is instigated by the upcoming end of a participant's plan.

### UNSCHEDULED REVIEW

Sometimes a participant's circumstances will change or the plan that was created no longer meets their needs. When this happens you will need to submit a Change of Circumstances Form and a Request for a Review application form.

If you receive a participant's plan after a scheduled review and it is not appropriate for that participant you will have to submit a review of a reviewable decision. You have 90 days to do this.

You can find the necessary forms on the CASOP team website. All forms need to be submitted with consent of the participant, the participants NDIS #, full name and DOB. It should be submitted to enquiries@ndis.gov.au

NDIS will contact you to make a time for a new review,. If you don't hear anything then you will need to follow up by calling NDIS on 1800 800 110

<https://www.ndis.gov.au/participants/how-review-planning-decision>