



# Flexible Plan Review Process



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# WELCOME!

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**Why have we decided to have these community education sessions?**

- So much change
- Information is Power
- You can't have true 'choice and control' unless you know how to navigate the system
- And don't forget ... Hamilton The Musical



## Thank you to DSC...

1. <https://teamdsc.com.au/resources/expect-a-call-plan-reviews>
2. <https://teamdsc.com.au/resources/participant-check-ins-the-reality-on-the-ground>



## .... Flexible Plan Review Process

- 1** Began being implemented during the COVID-19 pandemic
- 2** More flexible approach to scheduled plan **reassessments**
- 3** Starts with a **Participant Check-In**



# ... Changing Your Plan: <https://www.ndis.gov.au/participants/changing-your-plan>

## Participant check-ins: The official line

We will continue using check-ins as a way to support you in using your plan.

We introduced participant check-ins as part of our response to the COVID-19 pandemic to make sure that you could continue to get the supports you needed.

We have decided to keep them because you have told us that you like having the chance to talk to us about how your plan is working for you.

The participant check-in focuses on talking to you about your current situation, checking on your wellbeing and making sure your NDIS supports and other supports are meeting your needs.

We will check in with you before your reassessment date.

If you haven't heard from us six weeks prior, call us on 1800 800 110 or [find and call your nearest office](#).

# Plan Review Process

The plan review process starts with either:

## 1. Participant Check-In:

An NDIA representative which may be a delegate or LAC or a **Participant Support Officer (PSO)** will make contact with a participant (or their nominee) to discuss the participant's wellbeing to ensure their NDIS supports, and their other supports are meeting their needs.

- Check-ins are mostly via phone but we have seen email check-ins too.
- Participants will receive a default plan of 2 years

## 2. A Plan Continuation:

Participants or their nominee are informed via a snail mail letter that their plan will be continued for another 12 months unless they contact the NDIA.



[Reviewing your plan and goals | NDIS](#)



## .... Plan Review Process

**The Plan Review Process will lead to one of three outcomes:**

- 1. Plan variation:** New NDIS plan with the same/similar supports
- 2. Plan variation:** New NDIS plan with minor changes to current supports
- 3. A Plan Reassessment:** NB: Any changes to the current plan will need to be tested against Reasonable and Necessary Criteria



## .... Plan Review Process: Capacity Building Examples

Inform participants about the new plan review processes and their rights when receiving a Check-In or a letter offering a plan continuation e.g.

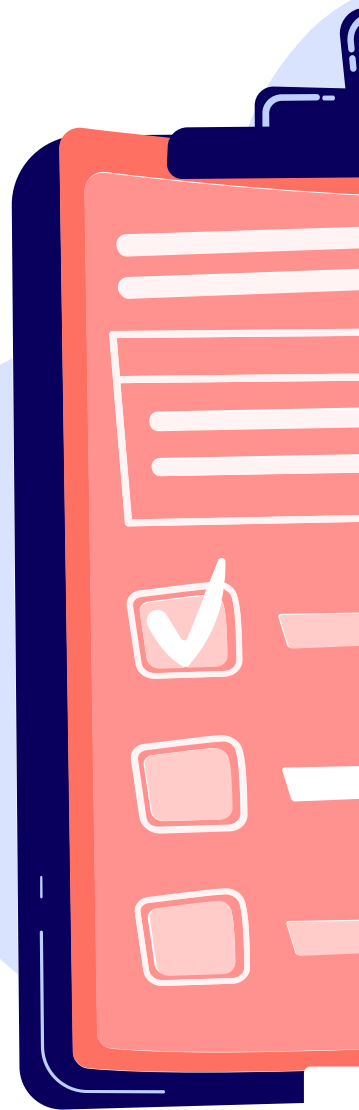
- 1** Request a call back for a time when a support person can be present (Check-In)
- 2** Request a plan length that is different to the default: discuss
- 3** Discuss how the 3 potential outcomes might affect their supports





## .... Preparing for a Plan Reassessment

- Revisit current plan goals to identify outcomes and barriers
- Seek progress reports from capacity building service providers
- Understand how many hours of core supports are utilised across the week
  - Day, time, duration, ratio of support, what type of support, high intensity?
- Have an Assistive Technology inventory
  - what needs to be replaced, repaired or upgraded in the next year?
- Do you need a Support Coordination report?



## .... Typical Support Packages (TSP)

- Planners have **KPIs** based on keeping Plans within a certain range of the TSP
- TSPs are based on a person's age, disability, living situation and abilities
- Where support needs are greater than the TSP, the Planner must submit evidence for approval
- LACs have no authority to approve Plans – they need evidence to get higher Plans across the line!



••• NDIS Act 2013 Section 34 Reasonable and Necessary Criteria: **required for all Plan Reassessments**

**Supports need to meet all R & N criteria**

- ✓ Related to goals
- ✓ Supports social and economic participation
- ✓ Value for money
- ✓ Effective and beneficial
- ✓ Takes into account reasonable expectations of others
- ✓ Most appropriately funded by NDIS

<https://www.legislation.gov.au/Details/C2022C00157>

## .... New Plan same supports



Great choice if the participants plan is meeting their support needs and goals



No allied health reports or assessments required



No need to attend a formal planning meeting



Default plan of 2 years duration



Plan funds will be indexed



## .... New Plan minor changes

- Great choice if the participants plan is *mostly* meeting their support needs
- May need to provide evidence to support the change depending on individual circumstances
- No need to attend a formal planning meeting
- Default plan of 2 years duration
- Plan funds will be indexed

E.g. Change to funds management, piece of equipment funded in last plan is not required in the new plan



## .... Plan Reassessment

- Will need to attend a formal planning meeting
- Entire plan will be reassessed
- Will need to provide any relevant allied health reports or assistive technology quotes to the NDIA
- Will need to provide a Support Coordination report (if SC was included in the plan)
- NDIS plan budget may be increased OR decreased
- Default plan of 2 years duration



## Capacity Building Examples

Inform participants about their **rights** when receiving a Participant Check-In phone call, for example:

- 1 Request the NDIA to call back at a time when a support person can be present (eg informal support, Support Coordinator, Advocate)
- 2 Request a plan length that is different to the default (2 years): both **longer** and **shorter** than 2 years



(Discuss potential options with the participant if they accept a new plan with the same supports or minor changes, but their circumstances change at a later date?)

## .... Mitigation Strategies

Take a proactive approach to a change in participant circumstances....

- Ensure participants have a functional assessment on file with the NDIA which reflects their current level of functioning
- Support a participant to let the NDIA know about any changes to their situation
- Support a participant to gather evidence to help the NDIA understand how their situation has changed
- Complete a Change in Situation Form
- Ensure that the participant's communication requirements are documented within their NDIS file

