

# Your plan

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**Quick summary:** Once we approve your plan, you can start to use your supports. If you want us to, we'll help you start using your plan, and help you connect with supports in your area. You must spend your funding according to your plan. We'll check-in with you during your plan to make sure it meets your needs and to check whether your situation has changed. You must also contact us if your situation changes during your plan. You usually can't use your plan after you're outside Australia for more than 6 weeks, or don't claim compensation you're entitled to after we ask you to.

## What's on this page?

This page covers:

- [What principles do we follow to create your plan?](#)
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- [What supports can you buy with your NDIS funding?](#)
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You may also be interested in:

- [Applying to the NDIS](#)
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- [Plan reviews](#)
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## What principles do we follow to create your plan?

The NDIS was set up as a world first approach to disability support. It puts people with disability at the centre of decision-making, through the principles of reasonable and necessary supports and individual choice and control.

As an insurance-based scheme, we take a lifetime approach to a participant's support needs. We provide assurance to people with permanent and significant disability or

developmental delay, and to people who might acquire disability or developmental delay, that they will get the support they need. Individual funding means we help participants to purchase services and supports from a competitive and consumer-driven marketplace.

## What supports can we fund?

NDIS supports should complement, not replace, other supports available to you. That's why we consider:

- the things you're able to do for yourself
- support you have from others in your network, including family members, relatives, friends, local community services and mainstream government services.

One of our aims is to help maximise your independence by working with the local mainstream government and community services that help you live an ordinary life. We all do best when we're connected to our communities.

And as an active consumer, it's important you are able to shop for and access providers who meet your needs. We can help you find providers who meet your needs.

Once we've considered your circumstances, we need to follow the rules determined under the law for the NDIS in our planning decisions.<sup>1</sup> We fund supports that are reasonable and necessary. This means we will only fund a support if it meets **all** of the following criteria:

- the support is related to your disability<sup>2</sup>
- the support will help you pursue your goals and aspirations<sup>3</sup>
- the support will help you undertake activities that will increase your social and economic participation<sup>4</sup>
- the support is value for money,<sup>5</sup> which means that the costs are reasonable:
  - when compared to the benefits to be achieved, for example, whether purchasing the support is likely to reduce the cost of funding other supports in the long term<sup>6</sup>
  - when compared to alternative options that may provide you with the same outcome at a similar or cheaper cost<sup>7</sup>
- the support is likely to be effective and beneficial for you, having regard to good practice and evidence<sup>8</sup>
- the support is required to complement the informal supports you have available, by taking into account what is reasonable for families, carers, informal networks and the community to provide<sup>9</sup>

- the support is most appropriately funded or provided by the NDIS<sup>10</sup>
- the support is not more appropriately funded by another service system, agency, person or body, such as the education system or the health system.<sup>11</sup> We can't fund a support if it's the responsibility of another service system.

## What supports don't we fund?

We do not fund a support if:<sup>12</sup>

- it is likely to **cause harm** to you or others<sup>13</sup>
- it is **not related** to your disability<sup>14</sup>
- it **duplicates** other supports delivered by the NDIS<sup>15</sup>
- it is considered a **day-to-day living cost** (for example, rent, groceries or utility costs like your water bill) that are **not attributable or caused by** your disability support needs<sup>16</sup>
- providing the support would be **against the law**<sup>17</sup>
- it consists of **income replacement**<sup>18</sup>
- it is the **responsibility of other service systems** to provide (for example, your state government, the education system, or the health system).<sup>19</sup> These different systems have different responsibilities, and are designed to complement each other to form a government safety net. Like all Australians, NDIS participants continue to have access to these systems. We can't fund a support if it's the responsibility of another service.

## How do we manage the financial sustainability of the NDIS?

The NDIS is an insurance scheme, and one of our core functions is to manage the financial sustainability of the Scheme.<sup>20</sup>

When we make decisions about the supports we fund in your plan, we must also consider our need to ensure the **financial sustainability of the NDIS**.<sup>21</sup> This means we must work within our funding budget, set through agreements between the Australian, and State and Territory governments.

It's also important to know the NDIS is only one part of the broader National Disability Strategy that supports people living with disability. The overall success and sustainability of the National Disability Strategy relies on:

- people accessing their informal support network to get the help they need from day to day

- people using their personal income to pay for their day to day living expenses, as is expected of all Australians
- mainstream and community services being available from state and territory governments, and other federal government programs such as Medicare
- a fair distribution of NDIS supports to those who need them, provided within our funding budget.

Staying within our budget ensures the NDIS will be here to support generations of Australians and their families.

## What principles do we use to create your plan?

We use the following 7 principles, to create plans that help you get the reasonable and necessary supports you need, and to make sure the Scheme is financially sustainable:

- [Fair for everyone, both today and for future generations](#)
- [Fair funding to pursue your goals](#)
- [Evidence-based best practice](#)
- [Fair early investments](#)
- [Fair support across service systems](#)
- [Fair supports for your disability needs](#)
- [Fair assistance from multiple programs](#)

### **Fair for everyone, both today and for future generations**

While we need to consider your individual circumstances and disability needs, we also need to make consistent decisions and treat people fairly.

This means participants with similar circumstances and disability needs should receive similar amounts of supports in their plans. We also need to ensure the total cost of all participant plans are within the overall NDIS budget set by governments.

We use Typical Support Packages to help us do this. The Typical Support Package give us an indication of what supports we'd usually expect to include in your plan, based on your situation and disability support needs.

Each support in your plan must be reasonable and necessary, but they also need to be reasonable and necessary as a package of supports. We approve your whole plan, not the individual supports in your plan in isolation.<sup>22</sup> The Typical Support Package helps guide this validation process.

The Typical Support Package also helps to guide the consistency of our decision making process. We use these to check your overall plan to make sure that all your supports make sense together, and that your support types and amounts will complement each other to help you fulfil an ordinary life.

We may then increase or decrease the funding in your plan based on:

- our discussion with you
- any reports or other information we have
- applying the [NDIS funding criteria](#).

This helps keep the system fair for everyone, and ensure we remain financially sustainable.

### **Fair funding to pursue your goals**

Goals are important.<sup>23</sup> The supports we fund need to help you increase your independence and pursue your goals.<sup>24</sup> This means your supports should help overcome any disability-specific barriers which may be stopping you pursuing your goals.

This doesn't mean we fund all support costs associated with you pursuing your goals. Also, you may have goals and aspirations we can't fund supports for. This is because helping you pursue your goals is only one of the NDIS funding criteria, so not all supports that help you to pursue your goals will be reasonable and necessary.

Other things to know about when setting your goals:

1. **Setting more goals or bigger goals doesn't mean we'll provide more funding or fund more supports.** For example, if your goal is to live independently in a house with a swimming pool, we may fund home modifications that address your disability related needs. This might be a home modification to make your bathroom accessible. We won't fund the swimming pool because this isn't related to your disability support needs. The funding in your plan might be similar to someone else who has a goal of 'to have a more accessible bathroom'.
2. **Setting a goal doesn't mean we have an obligation to fund supports that help you pursue that goal.** For example, if your goal is to get a gym membership to get fit, we wouldn't usually fund this. Gym memberships are things that all people, with or without disability, might want or need.
3. **Setting a goal about an explicit type or amount of support you might want doesn't mean we have an obligation to fund that support or provide that amount of funding.** For example, you may tell us your goal is 'to get a top model shower commode' and you show us the one you want costs \$4,000.

If there is a shower commode that costs \$3,000, and your occupational therapist confirms this one will meet your needs, we are more likely to fund this one instead because it is likely to deliver the same result at a lower cost. We may also look at alternatives.

### **Evidence-based best practice**

We only fund supports that will be, or are likely to be, effective and beneficial for you, having regard to current good practice.<sup>25</sup> This means we consider if there is evidence that the support is effective and beneficial for someone with similar disability support needs.

We will consider different types of evidence when making decisions and we won't need an expert report for every support, as we can often rely on other information or evidence.

For example, we may already have information about whether the support is widely accepted to suit someone with your disability support needs.<sup>26</sup> The primary source of evidence we rely on, and give the greatest weight to, is evidence from sources that are reliable and widely-recognised. This includes published and refereed literature, and any consensus of expert opinions. If there is no evidence to show a support is reasonable and necessary,<sup>27</sup> we won't fund the support.

You can find the types of evidence we need on [our website](#), and in [Our Guidelines](#).

### **Fair early investments**

Having access to capacity-building supports early in your NDIS journey is considered to be an early investment. This early investment is intended to help increase your independence, and reduce your reliance on NDIS funding over time.

This is an important concept that we consider when we create your plan, and again at future plan reviews. When we review your plan, we reassess all the supports you require to meet your disability support needs at that time.

Over time, your capacity building supports may no longer be reasonable and necessary, in regard to your current functional capacity, the effectiveness of the capacity building supports,<sup>28</sup> and value for money.<sup>29</sup>

If your overall funding level goes down from one plan to the next, it may be because you no longer need the same type or amount of supports, such as capacity building supports. Also, if the capacity building investment has been successful at building your independence, then your need for other supports may also decrease, for example core supports.

So other things being equal, you should expect your overall plan value to reduce over time as the benefits of capacity building are realised.

## **Fair support across service systems**

The support you need may be the responsibility of another government service, such as education or health. We don't fund these services, and need to consider the supports you should receive from these services when determining the supports in your plan.

## **Fair supports for your disability needs**

When we make decisions about which supports we can fund, we consider whether a support is reasonable and necessary for you and apply the [NDIS funding criteria](#). Sometimes, you might ask for supports to help with impairments that were not part of your Access eligibility assessment. When this happens, we need to make sure the support will help you address needs that arise from an impairment that meets the same eligibility criteria we consider at [Access](#).

You don't need to make a new Access request if you ask for supports to help with an impairment that was not part of your Access eligibility assessment. We will work out if you need the support you have asked for to address an impairment that would meet our Access criteria. We may ask you to provide evidence to help us work this out. We will decide if the requested support is reasonable and necessary. We will apply the NDIS funding criteria based on the impairments that would meet our Access criteria.

By funding the right disability supports for your permanent impairments that meet our Access criteria, we are ensuring the system is fair for everyone, and that the NDIS remains financially sustainable.

## **Fair assistance from multiple programs**

NDIS funding can't duplicate other funding or supports you may receive due to your disability.

For example, you may have received a lump-sum payment or receive regular payments as a form of compensation for an accident. Or, you may be receiving ongoing supports from another program or insurance scheme, for example, Worksafe or the Transport Accident Commission.

We don't duplicate this funding or these supports. We may reduce the total value of your NDIS plan to account for compensation you receive, or we may not fund certain supports.

## **What happens once your plan is approved?**

Once we approve your plan, you can start using it. This means you can spend your NDIS funding on the supports set out in your plan.<sup>30</sup>

We'll send you a copy of your plan within **7 days** after we approve it.<sup>31</sup> You can also find your plan in the [myplace participant portal](#).

If you have a [nominee or child representative](#), they'll get a copy of your plan too. If you want to, you can show your plan to another person or someone that works with you, like a health professional. This is entirely your decision. Learn more about [sharing your plan](#).

You can also ask us to share your plan with other people. We can only share your plan where you ask us to. Learn more about [your privacy and information](#).

Your plan will include the information you gave us about you, your situation and your goals. It will also include supports to help you pursue your goals.

We may include funding in your plan for supports like:

- help with everyday tasks, such as [personal care supports](#)
- equipment and technology, such as assistive technology, hearing supports or orthotics
- home and living supports, such as Supported Independent Living, Specialist Disability Accommodation or home modifications
- disability-related health and therapy supports or behaviour supports
- social and community participation supports, such as social and recreation supports or work and study supports
- transport.

Learn more about the [supports you can access](#) and how we decide which supports are [reasonable and necessary](#).

This guideline explains how we help you use your plan, and what you can buy with your funding. For general information about how to use your plan and the myplace portal, check out our page on [using your plan](#).

## How do you start using your plan?

Once your plan is approved, we'll ask if you want to meet and talk about how to use your plan. We call this an implementation meeting. If you want to have this meeting, we'll arrange it within **28 days** after we approve your plan.

Your [Early Childhood Partner](#), [Local Area Coordinator](#), [Support Coordinator](#) or [Recovery Coach](#) can help you start using your plan.

For example, they can help you:



- understand your plan, and what supports you can buy with your funding
- understand what supports other government services, such as the health or education systems, can provide for you
- connect with your community and other government services
- find providers that meet your needs and will help you pursue your goals
- use the [myplace portal](#)
- make [service agreements](#) and [service bookings](#) with your providers
- answer any questions or concerns you have
- ask for a plan review if something in your life changes.

An Early Childhood Partner can also help families understand the principles of [Best Practice in Early Childhood Intervention](#).

If you [self-manage](#) your funding, you'll need to give us bank account details before you can claim any funding.

## How can we help you connect with informal, community and mainstream supports?

There are many supports you can get outside the NDIS. These include:

- informal supports, such as your friends, family and other people you know in your community
- community supports, such as community groups, religious groups, sporting groups or other activities in your area
- mainstream supports, such as health, education and other government services that are available to all Australians.

These supports can often help you pursue your goals.

When you start using your plan, we'll see how we can help you connect with other supports available to you.

For example, we could help you:

- find community clubs you'd like to join, or activities you'd like to do
- talk to organisations, so they can adapt their service to meet your needs
- contact other government services, such as Medicare, childcare, job services or health providers

- explore ways you can see your family and friends more often, or make new friends, if you want to.

Learn more about these supports in our [reasonable and necessary supports guideline](#).

## How do you find service providers?

A service provider is a person or organisation that provides your funded supports.

You often have choice and control over who provides the supports in your plan. You can usually choose where and when your supports are provided.

Some providers are registered with the NDIS Quality and Safeguards Commission. This means they meet strict conditions for the quality and safety of their services. We call them 'NDIS registered providers'. Learn more on the [NDIS Quality and Safeguards Commission website](#).

If a provider isn't registered with the Commission, we call them an 'unregistered provider'.

You can usually choose any provider you want. You must use NDIS registered providers for [some types of supports](#).

Your Early Childhood Partner, Local Area Coordinator, Support Coordinator or Recovery Coach can help you. We can't recommend specific providers to you. But we can let you know about the different providers in your area, to help you decide which ones you might like to use.

You can also check for providers on the internet, look at reviews, or get advice from friends or family. It's a good idea to speak with different providers before you choose one.

You can search for NDIS registered providers on the myplace portal, or check out our [provider lists](#) for each state and territory.

We don't pay for family members to provide paid supports other than in very limited situations. Learn more about this and [sustaining informal supports](#)

## How do you agree on supports with your service provider?

Once you've chosen a provider, you'll need to contact them and agree on what supports they'll provide.

You can negotiate with your provider about what you get from your support. For example, you can agree with your provider about:

- what's included and not included in the support
- the cost of the support
- your and your provider's responsibilities

- how to change the agreement in the future if you or your provider want to
- how you and your provider will resolve any issues and disputes.

Your Early Childhood Partner, Local Area Coordinator, Support Coordinator or Recovery Coach can help you negotiate with service providers.

You don't need a written service agreement for all supports. But it's usually a good idea to have one and to record answers to the types of questions listed above. This way, it's clear what you and your provider agreed to. You need a written service agreement for [Specialist Disability Accommodation](#).<sup>32</sup>

Even though we fund the support, we're not part of the agreement. The service agreement is between you – the consumer – and your provider. This is a legal agreement that you're both responsible for.

Learn more about [service agreements](#) and the things to think about when making a service agreement.

### **What happens if your agreement doesn't go the way you want it to?**

You need to raise any problems directly with your provider. It's important to set out your expectations and your provider's responsibilities in your agreement.

The [Australian Consumer Law](#) applies to service agreements.<sup>33</sup> This law protects you as a consumer when you buy supports with your NDIS funding.

The Australian Competition and Consumer Commission (ACCC) has some [helpful resources](#) if you have a complaint or need advice. We also have links to other consumer resources on [our website](#).

If you want to make a complaint about a provider, you can also contact the [NDIS Quality and Safeguards Commission](#). The NDIS Commission can take complaints from anyone about:

- supports that weren't provided in a safe and respectful way
- supports that weren't delivered to an appropriate standard
- how an NDIS provider managed a complaint about the supports they provided to you.

### **What if there are no service providers in your area for your supports?**

If you're finding it difficult to find service providers in your area, talk to your Early Childhood Partner, Local Area Coordinator, Support Coordinator, or Recovery Coach. They may be able to help you find services in your area, or work out other options for your situation.

You may be able to get some support over the phone or internet, for example therapy through [telehealth](#).

## What supports can you buy with your NDIS funding?

You must spend your funding on the supports set out in your plan.<sup>34</sup>

There are things you can't spend your funding on such as items that are illegal or relate to your day to day living costs. Learn more about [what you can't spend your funding on](#).

The funding in your plan can either be:<sup>35</sup>

- **Flexible:** this is when we describe your supports generally. This means you have greater flexibility on what supports you buy with your funding.
- **Fixed:** this is when we describe your supports specifically. This means you must use your funding for the supports we describe in your plan.<sup>36</sup> This is sometimes called a 'stated support'.

We usually describe supports generally, so you have more choice in how you use your funding.

For example, we could describe a support as "\$5,000 of therapy". This means you can choose what type of therapy you buy with this funding. You could use \$3,000 for occupational therapy, and the remaining \$2,000 for physiotherapy.

Other funding in your plan may be fixed. For example, your plan may say you need to buy specific supports, or use specific providers with your funding. If so, you must use your funding in the way we describe it in your plan.

If you're not sure how we described the supports in your plan, ask your Early Childhood Partner, Local Area Coordinator, Support Coordinator or Recovery Coach.

Learn more about [how we decide to describe supports](#).

## What are the support budgets in your plan?

Your supports will be divided into 3 different budgets:

- **Core Supports** – supports for everyday activities
- **Capacity Building Supports** – supports to help you build your skills and increase your independence
- **Capital Supports** – supports such as assistive technology, vehicle modifications, home modifications and Specialist Disability Accommodation.

Each budget is divided into a number of support categories. Support categories have more detail about what supports you can buy with your funding. When your funding is flexible, you can usually choose what supports you buy within the [descriptions for each support category](#).

Your Core Supports budget is the most flexible. You can usually use your funding across all the support categories except transport in the Core budget if:

- we described the supports as flexible
- you have the same plan management options for your Core Supports.

Learn more about the [support budgets and support categories in your plan](#).

## When do you need to use NDIS registered providers?

If your funding for supports is Agency-managed, you can only use 'NDIS registered providers' for those supports.<sup>37</sup> NDIS registered providers meet strict conditions for the quality and safety of their services. Learn more on the [NDIS Quality and Safeguards Commission website](#).

Some supports can only be provided by NDIS registered providers. These include:

- [Specialist Behaviour Supports](#), if the provider will undertake a behaviour support assessment or develop a behaviour support plan<sup>38</sup>
- any support that will likely involve a [regulated restricted practice](#),<sup>39</sup> either on an interim or ongoing basis
- [Plan Management](#)<sup>40</sup>
- [Specialist Disability Accommodation](#).<sup>41</sup>

You must use NDIS registered providers for these supports, even if your plan doesn't say you need to. You must also use NDIS registered providers for these supports even if your funding is self-managed or plan-managed.

## How much will we pay for each support?

There may be a limit on how much you or your providers can claim for different types of supports.

We set out these price limits in the [NDIS Price Arrangements and Pricing Limits and NDIS Support Catalogue](#).

We update the Pricing Arrangements and Pricing Limits often to account for price changes, such as staff wage increases. We may change the amount of funding in your plan if the prices for your supports change.

The amount of funding you can claim depends on your plan management option. There are different [ways to manage your funding](#). If your funding is:

- **Agency-managed:** NDIS registered providers can claim up to the maximum price in the Pricing Arrangements and Price Limits for each support.
- **Plan-managed:** Your [plan manager](#) can claim up to the maximum price in the Pricing Arrangements and Price Limits for each support.
- **Self-managed:** You can choose how much to pay for each support, as long as you don't spend more than the total funding for the support in your plan. This means you can claim more than the NDIS Pricing Arrangements and Price Limits. You should use the Pricing Arrangements and Price Limits to ensure you're getting the best value from your providers.

If you have self-managed [transport funding](#) in your plan, we can often pay this as a fortnightly payment to your bank account.<sup>42</sup> This means you don't need to claim each time you use your transport supports.

You can always claim less than the prices in the Pricing Arrangements and Price Limits – it doesn't matter how your funding is managed. For example, your provider may charge lower rates, which often means you can get more support from your funding.

If a support isn't in the Pricing Arrangements and Price Limits, you'll need to agree on a price with the provider.

### **Example 1**

Omar self-manages his funding. His plan includes a support described as "\$2,000 of therapy". This is around 10 hours of therapy at the NDIS Pricing Arrangements and Price Limits rate. Omar finds a therapist who is very experienced with his complex disability support needs. The therapist's rates are higher than the NDIS Pricing Arrangements and Price Limits.

Omar decides he wants to use this therapist, even though it means he only has funding for 8 hours at the therapist's rate. Omar can do this because he self-manages his funding. Omar thinks he'll get a much better service, even with fewer hours.

### **Example 2**

Kristy's plan includes a support described as "\$12,000 for social and recreation support". She's currently using this funding for 4 hours of support per week to go to cricket matches on the weekend.

She finds a provider who charges less than the rates in the NDIS Pricing Arrangements and Price Limits, and decides to switch to the new provider.

After a couple of months, she's now saved some extra funding by using this provider. As well as the 4 hours per week for cricket matches, she decides to use the extra funding to join her friends at the pub every few weeks.

### **When do you need an assessment or quote before buying supports?**

Sometimes we decide you need a quote before you can claim the funding in your plan. This helps us ensure the support is [value for money](#), which is one of the NDIS funding criteria.

If so, this will show in your plan as '**quote-required**'. You'll need to give us at least one quote before we make the funding available in your plan.

We may do this for supports like:

- [high cost assistive technology](#)
- [high cost home modifications](#)
- meal preparation and delivery.

For some supports, the funding is available but you need to get an assessment before you buy the support. We may do this for [mid cost assistive technology](#), [mid cost home modifications](#), or supports with more risk. We'll let you know in your plan if you need to get an assessment before buying a support.

### **What if you self-manage your funding?**

There are some things you need to do if you self-manage your funding. For example, you need to keep receipts for your purchases for 5 years. You'll also need to be able to show how you've used your funding if we ask you.

Learn more about [self-managing](#).

### **What happens if you buy supports that aren't in your plan?**

You must spend your funding to buy the supports set out in your plan.<sup>43</sup> We'll explain the types of supports included in your plan, so you know how to use your NDIS funding.

We also have more information on our website about [using your funding](#).

If we think there's a problem with how you're using your plan, we may need to investigate it. For example, we may check what supports you bought with your funding, or ask for evidence such as a receipt.

If you spend your funding on supports that aren't set out in your plan, you'll owe us a debt.<sup>44</sup> This means you'll need to repay the amount of money you spent on supports that weren't in your plan. If this happens, we'll contact you to work out how you can repay the money.

Remember, NDIS funding is for disability-related supports only. It's not intended to be a source of general income, or to be used for day-to-day living costs like rent.

## What happens during your plan?

Your plan will continue until it's replaced by another plan or you [leave the NDIS](#).<sup>45</sup>

You can ask your Early Childhood Partner, Local Area Coordinator, Support Coordinator, Recovery Coach, or [contact us](#) at any time if you have questions about your plan.

It's a good idea to monitor your funding on the [myplace portal](#). This can help you make sure you're using the right amount of supports in your plan. You can also keep track that you or your providers are claiming the right amount of funding for your agreed supports.

We also monitor your plan to check if there are any issues. If something doesn't seem right, we may contact you to see if there's anything we can help with.

We may also need to contact service providers or others assisting with your plan. If so, we'll only do this with your consent.

If you have a Support Coordinator or Recovery Coach, they usually need to send us reports during your plan. The reports let us know if your plan is working well for you, or if you need any changes to your plan.

For children younger than 7, we have an [Early Childhood provider report](#) form to help providers tell us about the supports the child has been given.

## How will we check-in with you during your plan?

We'll check-in with you during your plan to see how you're going. We'll ask if the supports in your plan are meeting your needs. We also do check-ins to see if you're having any problems using your plan.

We may check-in with you:

- at regular intervals, for example each year
- before the 'plan review date' shown in your plan
- if we think your plan might not be working for you.

For example, we may check-in with you if you're using too much or too little of your funding.

During a check-in, your Early Childhood Partner, Local Area Coordinator or planner will contact you and discuss your plan.

We'll ask:

- how you're going



- if you have any questions about your current plan
- how you're going with your goals
- if you have any new goals, or want to change your goals
- how you're using local services in the community or other government services
- how you're using your funded supports in your plan
- how your supports are helping you pursue your goals
- if your supports meet your disability needs
- if your situation has changed
- if you need help with big changes coming up in your life, like starting or finishing school or starting a new job.

### **Will we review your plan after a check-in?**

If the check-in shows your plan is working well for you, we usually won't need to do a plan review. Your plan will continue. We'll touch base at your next check-in to see if your plan still meets your needs.

If the check-in shows your plan doesn't meet your needs, we may need to do a plan review.<sup>46</sup> This means we'll change your plan and replace it with a new one.

There's also a date we need to do a plan review, even if you don't need any changes to your plan.<sup>47</sup> This is shown on your plan as the 'plan review date'.

We'll check-in with you and create your new plan before this date. If your plan is working well for you and your supports still meet the [NDIS funding criteria](#), we could give you a new plan with the same supports. Your new plan might also have less supports if there are some you no longer need. Or you might need a plan with more support

We'll make this decision based on your support needs, the principles we follow to create your plan and the [NDIS funding criteria](#).

We'll check each support is reasonable and necessary individually, as well as when considered as a package.

These types of plan reviews are called 'Agency-initiated plan reviews'.<sup>48</sup> Learn more about [plan reviews](#).

### **Example 1**

Kath is 3 months into her first plan, but she hasn't used any funding yet. Kath's Local Area Coordinator calls her and asks if we can help her in any way.

Kath is self-managing her funding, and has been using her supports. But she's not too sure how to claim the funding through the myplace portal. Kath's Local Area Coordinator teaches her the process step-by-step.

Kath's plan will continue, as she doesn't need any changes to her supports.

### **Example 2**

Artem is 18 months into his plan. His planner notices Artem has been using a lot more funding in the past month.

Artem's planner contacts him to check if there are any issues. Artem tells his planner how his parents suddenly became sick, so he's had to use more paid supports for the past month. His parents probably won't be able to support him for some time.

Artem and his planner discuss his situation. Artem's planner decides Artem needs a new plan with different supports. Artem's current plan doesn't meet his needs due to his change in circumstances.

Artem's planner then books a planning meeting with Artem. Together, they'll create a new plan with different supports for his new circumstances.

### **What if your situation changes during your plan?**

You must let us know if something happens or your situation changes, if it might affect:<sup>49</sup>

- your plan
- whether you're still eligible for the NDIS.

You must also let us know if it's likely one of these changes will happen in the future.<sup>50</sup>

This could include changes like if:

- there are significant changes in the support your family and friends provide
- your condition improves or gets worse, meaning you need more or less support
- you're starting a new job and need new or different support at work
- you're going overseas for a long period of time or you're moving overseas
- you're moving out of aged care or other residential accommodation, and you need different support in your new home
- you receive or claim compensation for an accident or illness related to your disability.

These changes don't always mean we'll do a plan review. But you must still let us know about these changes as soon as you reasonably can, after you know about them.<sup>51</sup>

We have a [form you can complete](#), or you can let us know in person or over the phone.

You should also let us know if you change your contact details, such as your phone number, email or your home or postal address.

## What if your new situation means your plan no longer meets your needs?

Sometimes your plan may no longer meet your needs, after something happens or your situation changes.

For example, you may need to replace assistive technology if it starts breaking down. Or, you may need paid personal care supports if your usual informal carers can't support you anymore.

If so, you can ask us to do a plan review. This is called a 'participant-requested plan review'.<sup>52</sup>

Learn more about [plan reviews and how to ask for one](#).

## When can't you use your plan?

Sometimes we may need to suspend your plan. This means your plan will continue, but you won't be able to use your supports for a period of time.<sup>53</sup>

We'll suspend your plan after:

- you're outside Australia for more than 6 weeks, unless [we give you more time](#)<sup>54</sup>
- [you don't claim compensation](#) you're entitled to after we ask you to, for example after you've sustained an injury.<sup>55</sup>

We'll let you know if we're going to suspend your plan.

If you go overseas, you can still use your supports and funding for up to 6 weeks (or longer if we give you more time). We call this a 'grace period'.

You'll probably need to have your funding self-managed or plan-managed if you need to use your funding overseas. This is because your NDIS registered providers usually don't support people in other countries. You'll also need to claim your funding in Australian dollars.

If you need to change your plan management while you're overseas, let us know and we can do a [plan review](#).

## What happens if we suspend your plan?

We can't pay any funding for NDIS supports while your plan is suspended.<sup>56</sup> Your service providers also won't be able to claim for services provided to you.

You can't ask for a [plan review](#) while your plan is suspended.<sup>57</sup>

An Early Childhood Partner or Local Area Coordinator also doesn't need to help you connect to other services while your plan is suspended. But we can still do this if we think it's appropriate.<sup>58</sup>

When we suspend your plan, we'll send you a new plan that shows that your funding is suspended. This plan will have no funded supports.

If we suspend your plan while you're overseas, we'll create a new plan once you return to Australia.<sup>59</sup> This means you can start using it again.

And if we suspend your plan because you haven't claimed compensation, we'll also create a new plan once you take action to claim it.<sup>60</sup>

### **What if you don't agree with your plan suspension?**

If we decide not to extend the grace period to use your funding overseas and you don't agree, you can ask for an internal review.<sup>61</sup> You'll need to ask for an internal review within **3 months** after we decide not to extend the grace period.<sup>62</sup>

You can't ask for an internal review if we suspend your plan because you haven't claimed compensation.

Learn more about [internal reviews](#).

### **When can you use your plan outside Australia for more than 6 weeks?**

In some situations, we can give you a longer grace period. If you think you'll be outside Australia for more than 6 weeks and need to use your funding, [contact us](#). We'll let you know whether we'll extend the grace period.

If you know you'll be overseas for more than 6 weeks, it's a good idea to contact us before you leave Australia. Let us know:

- how long you think you'll be overseas
- why you're going overseas
- what supports you need when you're overseas
- why you need NDIS funding for your supports.

There are some things we need to consider for everyone who will be outside Australia for more than 6 weeks. This includes if you're on an extended holiday for more than 6 weeks.<sup>63</sup>

When we decide if we'll extend the grace period, and for how long, we consider:<sup>64</sup>

- how long you'll be outside Australia
- what supports you're receiving through your plan
- if you can still get supports while you're outside Australia, and if we can help you find these supports
- if we can keep in touch with you while you're outside Australia

- if we previously decided to extend the grace period
- if denying your request would cause you ‘undue hardship’ – that is, it would make your situation overseas much more difficult, to a level that’s not fair or reasonable.

### **In what specific situations will we usually extend the grace period?**

We’ll usually extend the grace period if you’ll be overseas for:<sup>65</sup>

- humanitarian reasons, such as foreign aid
- one of the reasons below.

When we decide if we’ll extend the grace period, and for how long, we consider different things depending on the reason you’ll be overseas.

If the reasons below apply to a ‘family member’, this usually means a:

- husband or wife
- ex-husband or ex-wife
- de facto partner or former de facto partner
- child, parent, grandparent, grandchild or sibling
- child, parent, grandparent, grandchild or sibling of a spouse or de facto partner
- step-relative, such as step-parents and step-children
- adopted immediate family member.

### **If you’re studying overseas or doing an exchange study program**

We consider how long the course goes for.<sup>66</sup> The overseas study needs to be either:<sup>67</sup>

- part of a course you’re doing in an Australian high school, TAFE or other training, or university
- part of a recognised program of international exchanges, such as an exchange semester during university.

### **If you or a family member need to work overseas for a short period**

We consider how long you or a family member need to work overseas.<sup>68</sup>

### **If you or a family member are in the Army, Navy or Air Force [Reserve forces](#)**

We consider how long you or a family member need to be deployed overseas.<sup>69</sup>

### **If you need medical treatment or therapy that's not available in Australia**

We consider how long your treatment will take. We also allow a reasonable period of time for you to recover after your treatment or therapy.<sup>70</sup>

### **If you can't come back to Australia for a reason you can't control**

We consider how much time is reasonable to allow you to return to Australia.<sup>71</sup>

Some of the reasons you can't control while you're overseas include if you or a family member:<sup>72</sup>

- are involved in a serious accident
- become seriously ill
- are hospitalised
- are the victim of a serious crime
- are a party to custody proceedings
- need to stay overseas because of criminal proceedings, for example if you're involved or are a witness in a criminal trial.

Or there might be a situation that affects everyone in the area, including:

- war, industrial action, or social or political unrest you're not willingly participating in<sup>73</sup>
- natural disasters, such as earthquakes, bushfires, floods or cyclones<sup>74</sup>
- border restrictions you can't control, for example due to travel advice or a pandemic.

## What if you're not happy with your plan?

If you're not happy with your current plan, you should talk to your Early Childhood Partner, Local Area Coordinator, Support Coordinator, Recovery Coach, or planner.

They may be able to explain the decision, clarify how you can use the funding, or help you fix any problems. It's a good idea to do this soon after you get your plan.

We can also give you written reasons on why we made the decision. [Contact us](#) if you'd like reasons for our decision.

If you don't agree with our decision to approve your plan, you can ask for an internal review.

Having an internal review means someone who wasn't involved in creating your plan will review our decision to approve your plan. They'll consider if we made the right decision under the laws for the NDIS.

Once you get your plan, you have **3 months** to ask for an internal review.<sup>75</sup>

Learn more about [reviewing our decisions](#).



## Reference list

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- <sup>1</sup> NDIS Act and delegated legislation made under the NDIS Act, especially NDIS (Supports for Participants) Rules and NDIS (Plan Management) Rules.
- <sup>2</sup> NDIS (Supports for Participants) Rules r 5.1(b).
- <sup>3</sup> NDIS Act s 34(1)(a).
- <sup>4</sup> NDIS Act s 34(1)(b).
- <sup>5</sup> NDIS Act s 34(1)(c).
- <sup>6</sup> NDIS (Supports for Participants) Rules r 3.1(c).
- <sup>7</sup> NDIS Act s 34(1)(c); NDIS (Supports for Participants) Rules r 3.1(a).
- <sup>8</sup> NDIS Act s 34(1)(d).
- <sup>9</sup> NDIS Act s 34(1)(e).
- <sup>10</sup> NDIS Act s 34(1)(f).
- <sup>11</sup> NDIS Act s 34(1)(f).
- <sup>12</sup> NDIS (Supports for Participants) Rules part 5.
- <sup>13</sup> NDIS (Supports for Participants) Rules r 5.1(a).
- <sup>14</sup> NDIS (Supports for Participants) Rules r 5.1(b).
- <sup>15</sup> NDIS (Supports for Participants) Rules r 5.1(c).
- <sup>16</sup> NDIS (Supports for Participants) Rules r 5.1(d).
- <sup>17</sup> NDIS (Supports for Participants) Rules r 5.3(a).
- <sup>18</sup> NDIS (Supports for Participants) Rules r 5.3(b).
- <sup>19</sup> NDIS Act s 34(1)(f).
- <sup>20</sup> NDIS Act s 118(1)(b).
- <sup>21</sup> NDIS Act s 4(17)(b).
- <sup>22</sup> NDIS Act s 33(2).
- <sup>23</sup> NDIS Act s 33(5)(a).
- <sup>24</sup> NDIS Act s 34(1)(a).
- <sup>25</sup> NDIS Act s 34(1)(d).
- <sup>26</sup> NDIS (Supports for Participants) Rules r 4.1(d).
- <sup>27</sup> NDIS Act s 34(1).
- <sup>28</sup> NDIS Act s 34(1)(d); NDIS (Supports for Participants) Rules, rr 3.2-3.3.
- <sup>29</sup> NDIS Act s 34(1)(c); NDIS (Supports for Participants) Rules r 3.1.
- <sup>30</sup> NDIS Act s 46(1).
- <sup>31</sup> NDIS Act s 38.
- <sup>32</sup> NDIS (SDA) Rules r 36.
- <sup>33</sup> Competition and Consumer Act Sch 2.
- <sup>34</sup> NDIS Act s 46(1).
- <sup>35</sup> NDIS Act s 33(3).
- <sup>36</sup> NDIS Act s 46(1).
- <sup>37</sup> NDIS Act s 33(6).
- <sup>38</sup> NDIS (Provider Registration and Practice Standards) Rules r 7(3).
- <sup>39</sup> NDIS (Provider Registration and Practice Standards) Rules r 7(2).
- <sup>40</sup> NDIS Act s 42(2)(b).
- <sup>41</sup> NDIS (Provider Registration and Practice Standards) Rules r 7(1).
- <sup>42</sup> NDIS (Plan Management) Rules r 4.3(b).
- <sup>43</sup> NDIS Act s 46(1).
- <sup>44</sup> NDIS Act s 182(3).
- <sup>45</sup> NDIS Act s 37(3).
- <sup>46</sup> NDIS Act s 48(4).
- <sup>47</sup> NDIS Act s 33(2)(c).
- <sup>48</sup> NDIS Act s 48(4).
- <sup>49</sup> NDIS Act s 51(1)(a).
- <sup>50</sup> NDIS Act s 51(1)(b).
- <sup>51</sup> NDIS Act s 51(2).

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- <sup>52</sup> NDIS Act s 48(1).
  - <sup>53</sup> NDIS Act s 41(2)(a).
  - <sup>54</sup> NDIS Act ss 40(2)-(3), 41(1)(a).
  - <sup>55</sup> NDIS Act ss 41(1)(b), 105(2)(a).
  - <sup>56</sup> NDIS Act s 41(2)(a).
  - <sup>57</sup> NDIS Act s 41(2)(c).
  - <sup>58</sup> NDIS Act s 41(2)(b).
  - <sup>59</sup> NDIS Act s 40(3).
  - <sup>60</sup> NDIS Act s 105(2)(a).
  - <sup>61</sup> NDIS Act ss 40(2)(b), 99(1) item 5.
  - <sup>62</sup> NDIS Act s 100(2).
  - <sup>63</sup> NDIS (Plan Management) Rules r 5.7.
  - <sup>64</sup> NDIS (Plan Management) Rules r 5.8.
  - <sup>65</sup> NDIS (Plan Management) Rules r 5.6.
  - <sup>66</sup> NDIS (Plan Management) Rules r 5.9.
  - <sup>67</sup> NDIS (Plan Management) Rules r 5.9.
  - <sup>68</sup> NDIS (Plan Management) Rules r 5.10.
  - <sup>69</sup> NDIS (Plan Management) Rules rr 5.11-5.13.
  - <sup>70</sup> NDIS (Plan Management) Rules r 5.14.
  - <sup>71</sup> NDIS (Plan Management) Rules r 5.15.
  - <sup>72</sup> NDIS (Plan Management) Rules r 5.16(a).
  - <sup>73</sup> NDIS (Plan Management) Rules r 5.16(b).
  - <sup>74</sup> NDIS (Plan Management) Rules r 5.16(c).
  - <sup>75</sup> NDIS Act s 100(2).