

Changing your plan

Quick summary: Your plan may need to be changed for many reasons. If your situation changes, your disability support needs may change. You might need more supports, less supports or different supports. There are different ways we can change your plan. In certain situations, we might be able to vary your current plan. If major changes are required, we'll complete a plan reassessment, and you'll get a new plan. We used to call this a plan review. We'll check in with you during your plan to see if you need any changes to your plan. We'll talk with you about your situation and look at any information you have given us to work out if a change is needed. If it is, we'll then decide what type of change we need to do. You can ask us for a change to your plan at any time and we can decide to do a change to your plan at any time. A change to your plan isn't used to review a decision we have already made. We'll work with you to complete the change to your plan. We'll talk with you about your situation to work out what change is needed. We will then either update your plan or create a new a plan. We still need to follow the laws for the NDIS that apply when making a change to your plan. For example, any changes to the reasonable and necessary supports in your plan must meet the NDIS finding criteria.

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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.¹ 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 disability²
- the support will help you pursue your goals and aspirations³
- the support will help you undertake activities that will increase your social and economic participation⁴
- the support is value for money,⁵ 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 term⁶
 - when compared to alternative options that may provide you with the same outcome at a similar or cheaper cost⁷

- the support is likely to be effective and beneficial for you, having regard to good practice and evidence⁸
- 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 provide⁹
- the support is most appropriately funded or provided by the NDIS¹⁰
- the support is not more appropriately funded by another service system, agency, person or body, such as the education system or the health system.¹¹ 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:¹²

- it is likely to **cause harm** to you or others¹³
- it is **not related** to your disability¹⁴
- it **duplicates** other supports delivered by the NDIS¹⁵
- 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 needs¹⁶
- providing the support would be **against the law**¹⁷
- it consists of **income replacement**¹⁸
- it is the **responsibility of other service systems** to provide (for example, your state government, the education system, or the health system).¹⁹ 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.²⁰

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**.²¹ 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.²² 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.²³ The supports we fund need to help you increase your independence and pursue your goals.²⁴ 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.²⁵ 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.²⁶ 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,²⁷ 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 reassessments. When we reassess 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,²⁸ and value for money.²⁹

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 do we mean by changing your plan?

Your NDIS plan has information about you and your goals and aspirations. We call this the 'participant's statement of goals and aspirations.'³⁰ Your plan also has information about any supports we'll give you, the supports we'll pay for and how these funds and the other parts of your plan will be managed. We call this the 'statement of participant supports.'³¹ Learn more about [creating your plan](#).

Every plan must include a reassessment date.³² We need to look at your plan with you by this date and decide if any changes are needed. You can [ask us to change your plan at any time. We can also decide to change your plan at any time if we think we need to](#). You don't have to wait until the reassessment date. We'll work with you to change your plan.

In certain situations we can change your plan by updating part of your current plan. We call this a [plan variation](#).³³ Or we can decide to approve your new plan after a plan reassessment.³⁴ We previously called this a plan review. Both the decision to vary your plan and the decision to approve a new plan are reviewable decisions.

If you are not happy with a decision we have made in relation to your plan, then the best pathway is to seek an internal review of our decision. A plan change is not the right pathway to seek a review of a decision we have made.

Learn more about the difference between [plan variations](#), [plan reassessments](#) and [internal reviews](#).

What is a plan variation?

There are some situations where your current plan can be varied without the need for a plan reassessment. This means we look at just part of your current plan and make the changes in this plan and don't need create a new plan. We call this a varied plan. The law for the NDIS tells us what these situations are.³⁵ If we decide to vary your plan we'll prepare the varied plan with you.³⁶

We can vary your plan if you ask us to or if we think a plan variation is required.³⁷ When you ask for a variation, we call it a plan variation on the 'participant's initiative'. When we decide to make a variation, we call this a plan variation on the 'CEO's own initiative.' The varied plan we approve may be different to what you ask for.³⁸ We'll talk to you about this when we're preparing your plan. If the plan change is about funding in your plan, the varied plan still must meet the [NDIS funding criteria](#).³⁹

Your plan can be varied in in the following situations.

Fix a small or technical error

If there is a minor or technical error in your plan we can usually update your plan to correct it.⁴⁰ For example: a small mistake in your plan might be a spelling mistake we need to fix or we may need to add in a word that was missed.

A technical error is where there has been a mistake in how we have processed something. For example: If we have classified or calculated a support the wrong way we can fix it so it's right.

We'll fix any small or technical errors as fast as we can. We'll let you know if we have fixed an error in your plan.

If there's an error in your participant's statement of goals and aspirations' we'll contact you before we make any changes or corrections.

Change the reassessment date of your plan⁴¹

How far in advance a reassessment date is set in a plan isn't the same for everyone. Your reassessment date will be specific to you and your situation, generally though it will be 3 years. In some situations we can change your reassessment date to a later date or an earlier date if we need to.

For example: your plan is working for you so we change the reassessment date to a later date. Or you are due to have surgery and will need time to recover, we may change your reassessment date to an earlier or later date that suits you better.

We won't change your reassessment date if we are concerned about how your plan is working for you or you haven't been using the funds in your plan. In this situation we'll [check-in](#) with you.

If we change the reassessment date in your plan, we may need to make other variations to the statement of participant supports in your plan.⁴²

Case example

Fatima is a 27-year-old participant who lives with a mild intellectual disability. She speaks Arabic and uses an interpreter.

Fatima's plan is near to its reassessment date.

Fatima's planner organises an interpreter and a time to discuss Fatima's plan reassessment.

At the meeting, Fatima tells her planner that her current plan has been working well and that she would like her current supports to continue for the next 12 months.

Fatima's planner can see that she has been using her current plan well over the past 12 months and that her current supports will likely continue to meet her support needs.

Fatima's planner discusses with her whether she thinks her plan would meet her support needs for the next 3 years. Fatima agrees that this would work.

Fatima's planner approves a variation to her plan with the same supports for a duration of 3 years. Fatima's planner also lets her know that if her situation changes, she can contact the NDIS.

Update how the funds or other aspects of your plan are managed⁴³

We can update the statement of participant supports that is already in your plan to change how the funds or other aspects of your plan are managed. Learn more about [how we decide funding is managed](#).

For example: you may decide you would like to self-manage some of the supports in your plan and ask us to change your plan. We assess the risk and decide that we can vary your plan so you can self-manage the supports you asked to.

It's important to note that if you want a plan manager to manage some or all of your plan we'll need to assess the risk first. You'll need to agree to provide your plan manager with a copy of your plan. Learn more about [plan management](#).

Update who must provide a support or how a support must be provided⁴⁴

In certain situations, we can change the statement of participant supports to update who must provide a support or how a support must be provided.⁴⁵ We can only update this if in your current plan the statement of supports already specifies that a support must be provided in a certain way.⁴⁶ Learn more about [when we specify supports](#).

Case example

Toby is 17 years old and uses a text-to-speech communication technology to talk to his mates, family, and neighbours. He has recently upgraded his device and requires some intensive service provision from a speech therapist who is an Augmentative and Alternative Communication (AAC) trainer.

Toby's current plan included two sessions a week for four weeks with a qualified and experienced speech therapist. This was included as a stated support and Toby was about to start these sessions.

Unfortunately, Toby's speech therapist was unable to continue with the intended service due to an unexpected interstate move. His therapist did provide a referral to Toby for a suitably qualified alternative AAC trainer.

Toby has chosen to accept the referral as the new provider is able to give Toby the training support he requires, and they are available to meet with him soon for the planned frequency of sessions.

Toby has requested that the statement of supports in his current plan is varied to change the stated provider to the new provider he has chosen.

Toby's planner decides to vary his plan to include the new speech therapist as a stated support and maintains the frequency (manner) of service provision as previously stated. No other changes were needed in Toby's plan.

If your plan says that provider X must provide your supports and provider X closes down, then we can vary your plan to update who the specific provider is.

Change the statement of participant supports that is in your current plan, or of the funding of supports under the plan⁴⁷

We can do this for the following reasons:

- [we believe that you need crisis or emergency funding because of a significant change to your support needs⁴⁸](#), or
- [we receive information or report after your plan has started that we requested to help us prepare or approve your statement of supports,⁴⁹](#) or
- [we need to make an adjustment due to a change to the reassessment date of the plan⁵⁰](#) or
- [we make a minor variation to your plan which increases your funding.⁵¹](#)

We believe that you need crisis or emergency funding because of a significant change to your support needs

In unexpected circumstance we may be able to vary your plan to add emergency supports or increase the amount of a support for a limited time. We may do this if there is a significant change to your disability-related support needs and you need support straight away. We'll need enough information about your situation to be able to decide to do this.

Generally, when we add these supports we'll say how they can be used and for how long. These supports won't be for the whole length of your plan. We'll check-in with you regularly over this time. Near the end of the time-limited period we'll check-in to see if your plan can now continue without these emergency supports. If it can't we may need to do a plan reassessment.

If we're not sure if your Disability-related support needs will stabilise we might decide to vary your plan to add time-limited funds and also bring your reassessment date forward. This is so we can provide the immediate support you need and see if your Disability-related support needs stabilise. Towards the end of these time-limited supports we'll do a reassessment to see what your ongoing disability-related support needs are.

We might decide not to vary your plan if there are supports in your plan that you can use flexibly.

Case example

Leigh is 20 years old and lives at home with his dad, Geoff. Geoff is Leigh's only informal support and helps him with some of his personal care needs. Leigh also has support workers to provide personal care and to help him get around home and the community.

Geoff has had an accident and suffered a broken leg. Geoff needs rehabilitation and won't be able to help Leigh like he usually does. Geoff is expected to recover well, with likely medical clearance to be able to provide care to Leigh again in 10 weeks' time.

Leigh urgently needs additional personal care support as he is unable to manage this independently. He needs an increase in his support worker hours for personal care and support with his mobility. He calls his local area co-ordinator and asks for a plan variation to get supports to cover this change to his support needs.

Leigh's planner can see that his current plan won't cover his urgent support needs and approves an additional 10 weeks of personal care support in his plan.

Leigh's local area coordinator also makes a time to check in with him to see if he needs any other help or linkages to supports in the community.

We receive information or report after your plan has started that we requested to help us prepare or approve your statement of supports

We can vary your plan if it relates to the information or report we requested.

For example: When we created your plan with you we requested an occupational therapist assessment and report regarding your Assistive Technology needs to support your mobility goal. We receive this report after we approved your plan. We decide that the Assistive technology recommendations meet the NDIS funding criteria and vary your plan to add these supports.

We need to make an adjustment due to a change to the reassessment date of the plan

If we change your reassessment date in some situations we may also need to make other changes to your statement of supports or the funding of supports under the plan.

For example: if your plan is meeting your needs we might change the reassessment date so your plan goes for longer. If we do this we'll adjust the funding for supports to cover the extra time;

If we bring your reassessment date forward, the supports in your plan will not change. But because the funding is now for a shorter time, the funds will be adjusted to account for the shorter plan timeframe.

We make a minor variation to your plan which increases your funding

We can do a this if:

- we can look at the support separately from your other supports
- you don't have sufficient supports or flexibility of funding to cover a minor change
- adding a requested support will have a minor impact on the rest of your plan
- your plan with the minor change will meet your needs and the [NDIS funding criteria](#).

For example:

- We might add funding for repairs to a piece of assistive technology.
- If you're living in supported independent living accommodation, but want to look into living independently we may add funds to support you to explore [individualised living options](#).
- If you have an opportunity to start a job before there is time to do a plan reassessment, we may add specific employment supports that you need so you don't miss out on this opportunity.

Case example

James is 5 years old and has cerebral palsy. James requires an ankle foot orthotic (AFO) to improve his walking pattern and stability.

He has had a growth spurt and his current AFO is now too small and needs to be changed.

James' mum Rose is his child representative. Rose asks their Early Childhood Partner to help them make this change to James's plan.

It is clear to James's planner that James still requires the use of an AFO. This was considered reasonable and necessary in his current plan.

James' planner decides to vary his plan and approves funding for a new AFO. James doesn't need any other changes to his plan.

What is a plan reassessment?

We can do a plan reassessment at any time.⁵² Just like a plan variation we can reassess your plan if you ask us to or on the CEO's own initiative if we think a plan reassessment is needed.⁵³

For example, we may do a plan reassessment if:

- there are significant changes to your situation, such as starting work for the first time or moving out of home and your disability-related support needs have changed
- your plan reaches the reassessment date and your plan requires changes.⁵⁴

When we do a reassessment we can decide to create a new plan or we can decide to vary your current plan, depending on your situation.⁵⁵

How can I ask for a change to my plan?

A change to your plan could be a [plan variation](#) or a [plan reassessment](#).

There are 3 ways you can ask us for a change in your plan:

- [complete our form](#)
- [call us](#)
- visit one of [our offices](#).

You may decide to request to change to your plan if, for example:

- you have a change in your situation that is impacting your support needs
- you want to change how the funding is managed
- you urgently need a change in supports.

You'll need to give us any new information to help us decide if we'll do a plan change. The information we need sometimes can depend on reason you're asking for a plan change. This may include any assessments, reports, or other information. These are important in helping us understand how your situation has changed.

For example, you might ask for a change in your plan because your disability needs have changed, and you can't do things you used to be able to do. We usually need an assessment or report about how your support needs have changed.

If you just want to change [how the funding is managed](#) in your plan, we might be able to do a [plan variation](#) to make this change. We may not need new information if everything else is the same, for example you probably won't need assessments or reports. But we may need to ask you some questions about this change to make sure there aren't any risks to you if we make this change.

If we are doing a plan variation, we may not need all of this information, for example if you just want to change who manages your funding, you probably won't need assessments or reports as we can make these changes with a plan variation.

Your [plan nominee or child representative](#) can ask us to complete a change to your plan on your behalf.

You can also give consent for someone else to ask us to do a change to your plan on your behalf. For example, this could be an advocate, family member or friend.

If you want to give consent for this, there are 3 ways you can do it:

- fill in the [Consent for a Third Party to Act on Behalf of a Participant](#) form
- send us a letter or [email](#)

- [contact us](#) and we'll make a written note.

Learn more about [consent](#).

You can't request a change to your plan if your plan is suspended.⁵⁶ Learn more about [plan suspensions](#).

How can I change my goals?

You can change your statement of goals and aspirations at any time, you just need to let us know.⁵⁷ We'll update your plan with your new statement of goals and aspirations and give you a copy of your varied plan within 7 days of getting your changed statement.⁵⁸ The change results in a varied plan, rather than a new plan.⁵⁹ We can't decide to change your statement of goals and aspirations, we only change this if you ask us.

We don't make any other changes to your plan if you only ask us to change your participant statement of goals and aspirations. The supports funded in your plan, how your funding is managed, and when we must reassess your plan all stay the same.⁶⁰

We might make other changes to your plan if you ask for a variation or reassessment of your plan.⁶¹ We can also decide to do a plan change if we think we need to.

Learn more about [setting your goals and the information about you in your plan](#).

What happens after I request a change to my plan?

When we receive your request to change your plan we'll look at the information you have given us to make our decision.

Request for a plan variation

If you request a [plan variation](#), we can decide to:

- vary your plan⁶²
- not vary your plan⁶³
- let you know we need more time to decide.⁶⁴

We have to make our decision about your request for a plan variation within **21 days** of receiving your request.⁶⁵ We will send you a letter telling you about our decision and our reasons.⁶⁶

If we inform you that we need more time to decide, then we must either vary the plan or decide not to vary the plan as soon as reasonably practicable.⁶⁷ What is reasonable will depend on whether we have requested any information or reports.⁶⁸ We may ask you to provide more information to help us make our decision⁶⁹. Or we may ask you to undergo an assessment or examination, or both and provide us with a report or reports.⁷⁰

If we request more time to make our decision, we will decide whether to vary your plan within 28 days, or 50 days if we are addressing complex needs.

If you don't agree with our decision to vary your plan, or not vary your plan you can ask us to review this decision.⁷¹ Learn more about [internal reviews](#).

Request for a plan reassessment

If you request a [plan reassessment](#) we can decide to:

- vary your plan⁷²
- reassess your plan⁷³
- not reassess your plan.⁷⁴

Just like plan variations, we have to make our decision about your request for a plan reassessment within **21 days** of receiving your request.⁷⁵

We will send you a letter telling you about our decision. If we decide to vary your plan, or not reassess your plan, we will provide you with reasons for our decision.⁷⁶ If you don't agree with our decision to vary your plan, or not reassess your plan, you can ask us to review this decision.⁷⁷ Learn more about [internal reviews](#). If we don't make a decision within **21 days**, we are taken to have decided not to conduct a reassessment of your plan and this decision will be automatically reviewed.⁷⁸ We call this an automatic internal review. We'll let you know in writing if we do an automatic internal review.⁷⁹ You don't need to do anything.

Learn more about automatic [internal reviews](#).

If we decide to reassess your plan, we must complete the reassessment and either:

- vary your plan (as a result of the reassessment)⁸⁰ or
- prepare and approve a new plan.⁸¹

When do we decide to change your plan?

We may decide to do a **CEO Initiated** plan change if:

- your plan needs a [variation](#)⁸² - for example: to make changes to plan management, emergency funding is required or there is a mistake in your plan we need to fix.⁸³
- your plan needs [reassessment](#)⁸⁴ - for example: due to significant changes to your situation or if there is an issue with how your funding is being used.

If we decide to change your plan we'll let you know we're doing this and what type of plan change we are doing.⁸⁵

We must also reassess your plan before the reassessment date in your plan.⁸⁶ We'll write to you around 3 months before your plan reassessment date to let you know it's coming up.

We'll confirm the check-in details in the letter. After the reassessment we may decide to approve a new plan⁸⁷ or vary your current plan,⁸⁸ depending on your situation. The variation to your plan, or new plan, will be prepared with you.⁸⁹

If you don't agree with our decision to vary your plan, or approve a new plan, you can ask us to review this decision.⁹⁰ Learn more about [internal reviews](#).

If we can't complete the reassessment and either approve your new plan or vary your plan before your plan reassessment date, your current plan will continue beyond the reassessment date. Learn more about [what happens when your funding is extended](#).

Sometimes a plan will say that in certain circumstances we must reassess the plan.⁹¹ For example your plan might say your plan needs to be reassessed when you leave school.

During your plan, we will check-in to see how you're going. We will talk with you about how the supports in your plan are meeting your needs.

We will check-in with you:

- at regular times, for example each year
- if we think your plan might not be working for you.

Learn more about [check-ins](#).

If the check-in shows your plan is meeting your needs, we won't do a plan change and your current plan will continue.

But if we find that your plan isn't meeting your needs, we will discuss [changing your plan](#).

We may decide to do a plan change if we know your plan isn't working for you. For example, you may not have the right supports that you need. Or you may not be using your supports.

We might get this information from:

- you or someone else in your life
- your local area coordinator, early childhood partner, or support coordinator
- our system that shows how you're using the funding in your plan.

If we think you need a change to your plan, we'll let you know. We'll prepare your plan with you and we might not need to ask you all the usual planning questions. Your goals will stay the same if you don't want to change them.⁹²

Once we decide to change your plan, we will give you your varied or new plan as soon as we can.

We must provide you with a copy of your:

- varied plan **within 7 days** of the variation taking effect⁹³

- new plan **within 7 days** after your plan comes into effect.⁹⁴

If you have only changed your statement of goals and aspirations, then we will provide you with a copy of your varied plan **within 7 days** of receiving your changed statement.⁹⁵

Learn more about how long this takes in our [Participant Service Charter](#).

How do we make a change to your plan?

We'll work with you to change your plan. We'll think about the type of change your plan needs to meet your needs. We'll let you know what type of plan change we're doing, a [plan reassessment](#) or [plan variation](#), and what that means.

Usually, we'll do a plan change either in person or over the phone. It depends on what suits you best. You can ask a family member, friend, advocate, or other support person to be involved in your plan change.

Everyone's plan changes are different. When we're working with you to change your plan, depending on what type of change we're doing, and the sort of changes we're making, we may look at different things.

The length of time from the start of a plan to the reassessment date won't be for the same for everyone. It depends on your personal situation, goals, and support needs. Learn more about [how long your plan will go for when we create your plan](#).

Sometimes when we're doing a plan reassessment or plan variation we may also check to see if you're still eligible for the NDIS. We call this process an eligibility reassessment. This is a normal part of the plan reassessment and variation process. Learn more about [when you're no longer eligible for the NDIS](#).

What happens during a plan variation?

When we do a plan variation, we'll work with you to understand how your situation has changed. We think about the information you have raised and work with you to make any necessary changes to your current plan.

All supports in your varied plan must meet the [NDIS funding criteria](#). This includes the supports that were already in your plan.

When we vary your plan, we will let you know the date when the variation to your plan starts. This can only be on or after the day we decide to vary your plan.⁹⁶

What happens during a plan reassessment?

When we do a plan reassessment, we must complete the reassessment and decide to either:

- vary your plan (as a result of the reassessment)⁹⁷ or
- prepare and approve a new.⁹⁸

When we do a plan reassessment, we think about all the information we have about you, your goals, situation, and support needs. We reassess all the supports you require to meet your disability support needs. Some supports may no longer be required, while others may increase or change.

We'll usually look at how you've been using your supports and how well your previous plans worked for you.⁹⁹ We look at how much funding you used for supports in your current plan. This will help us decide if the supports are still working for you.

If you haven't used all the funding by your plan reassessment date, it doesn't mean we'll reduce the funding in your next plan. There may be very good reasons why you weren't able to use the funding.

We might talk about any problems you have using your funding and support you to get help with this. If you consistently don't use your NDIS funding, we think about whether the supports really do meet the NDIS funding criteria. For example, they may not be effective and beneficial for you if you're not actually using them.

Your needs and situation will most likely change over time. This means it's likely your NDIS funding will change over time. For example, your disability support needs might increase, and we might consider funding more supports.

Or, we might have funded supports to help you build your skills in a particular area. Once you have built those skills, you won't need funding for that anymore. So, we probably won't include that funding in your next plan. Supports to build your skills may have met the NDIS funding criteria before, but it might not meet the criteria in future.

All supports in your new plan must meet the [NDIS funding criteria](#).

What happens if we need more information?

We might need more information or an assessment to help us change your plan.¹⁰⁰ This helps us understand what supports you need. We might ask you for:

- a new assessment and report, if your last assessment was a long time ago, and doesn't tell us about your current support needs

- more information about your support needs, from a suitably qualified person such as your doctor or psychologist.

We must give you a reasonable opportunity, and a reasonable amount of time, to give us the information.¹⁰¹ The sooner you can give us the information, the sooner we can change and approve your plan.

In some situations, we may need to approve your plan before you get an assessment or give us information. If this happens we may then do a CEO initiated plan change after we receive the reports. This could be a plan variation or a plan reassessment.¹⁰²

For example, we might approve your plan so you have funding for urgent self-care supports. We could then do an CEO initiated plan change afterwards once you have the assessments and reports for other supports such as assistive technology.

How can I prepare for my plan change?

We have some guides you can use to help you prepare for your plan change. You can find [Booklet 3 – Using Your NDIS Plan](#) and [Preparing for your plan reassessment](#) on our website. You can also check out our pages on [Supports you can access](#) and [Would we fund it](#).

Before your plan change, you need to gather any assessments, reports, and other information to help us change your plan. You might have this information yourself. Or you might need to get it from a support coordinator or provider.

If we are doing a plan variation we may not need all of this information, for example if you just want to change who manages your funding, you probably won't need assessments or reports as we can make these changes with a plan variation.

If you have a [support coordinator or specialist support coordinator](#), we'll need a report from them. The report should tell us how your supports are meeting your needs and helping you pursue your goals.

For children younger than 7, we have an [Early Childhood provider report](#) form. Providers should complete this form to tell us about the supports the child has had. The form shows the information we need, such as:

- what services were provided, and who provided them
- a progress update including what stage the child has got to
- future recommendations.

When would we decide not to change your plan?

There may be several reasons why we might decide not to change your plan by doing a plan reassessment or variation when you ask us to.

When would we decide not to do a plan reassessment?

If you ask us to do a plan reassessment, we need to think about whether your current plan can meet your support needs, and the reason you are asking for a plan reassessment. We would decide not to do a plan reassessment¹⁰³, for example:

- [If you don't have any new information or evidence](#)
- [If your request is only about wanting more funding, or supports that other participants have](#)
- [If informal, community or mainstream supports can meet your needs](#)
- [If your plan is suspended.](#)

If you don't have any new information or evidence

We generally won't change your funding if there's no new information about how your support needs have changed. For example, we generally won't do a plan change if:

- you changed your mind about the supports you want, after we approved your plan
- there's no evidence your support needs have changed, that is, you can still do the same things you could do when we approved your plan
- there's not enough evidence to show you need changes to your funded supports, such as more therapy.

If your request is only about wanting more funding, or supports that other participants have

We generally won't change your funding just because you want more supports, or the same supports as others. This may include where you want:

- more funding because you've used all the funding in your plan, even though your situation hasn't changed
- other supports because another participant has these supports
- supports added to your plan without enough evidence on why you need them
- funding for supports that don't relate to your disability.

If informal, community or mainstream supports can meet your needs

We generally won't change your funding if friends, family or other services can meet your needs. For example, if you ask for things we:

- don't fund, like medical treatment, school fees or childcare
- would reasonably expect family or friends to do for you, such as short-term care if the family members who usually support you are sick.

If your plan is suspended

We also can't do a plan change if your plan has been suspended.¹⁰⁴ This usually happens after:

- you've been overseas for more than 6 weeks – there are some situations we can extend the 6 week period
- [you don't claim compensation](#) you're entitled to after we ask you to, for example after you've had an injury.

Learn more about [plan suspensions](#).

When would we decide not to do a plan variation?

There are reasons outlined in the NDIS Act¹⁰⁵ when we would decide to do a plan variation. These are outlined in this guideline in [What is a plan variation](#).

We would decide to not do a plan variation if it doesn't meet the [NDIS funding criteria](#), or the reasons outlined in this section.

For example:

- your plan is suspended or ceased¹⁰⁶
- you have flexible funding left in your plan that can be used
- we can't look at the variation without looking at looking at the other supports in your plan
- your situation has changed significantly, and a reassessment is required
- you are wanting more funding to help with a new or changed goal, and the request is not minor
- it is to avoid or replace an existing review or appeal pathway
- we don't have enough evidence to support a variation
- we have varied your plan several times and your plan isn't meeting your need so a reassessment is needed

- your needs can be met by your informal, community or mainstream supports
- you have used all the funds in your plan more quickly than specified in your plan.

How can we support you?

If we decide not to change your plan, we can link you with other services who may be able to help. Talk to your local area coordinator, early childhood partner, support coordinator or planner about how they can help you get other supports you may need.

If you don't agree with our decision not to either do a plan reassessment or plan variation, you can ask us for an internal review of that decision. This means another one of our staff, who wasn't involved in the original decision, will look at whether we made the right decision.

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

What if you're waiting for an internal review decision?

If your situation and support needs change while you're waiting for an internal review [contact us](#). Depending on the changes to your situation and support needs, we may decide to do an CEO initiated plan change.¹⁰⁷ You can also ask for a participant-requested plan change.¹⁰⁸

If we decide to vary your plan, or approve a new plan, while the internal review is still being completed, our decision to vary your plan, or approve a new plan, will become part of that internal review.¹⁰⁹ This will happen automatically and you don't need to do anything. Learn more about [internal reviews](#).

What if you're waiting for an external review decision?

If you're a participant and your situation or disability support needs change during the external review process, contact your case manager. Your case manager is our staff member who helps us at the Tribunal. Your case manager will explain the options available to you. We may also need to let the Tribunal know what we think we should do if it might affect your external review.

You can still use the supports in your plan while the Tribunal considers your external review.

Learn more about [external reviews](#).

What happens after I have had a change to my plan?

After we decide to change your plan, You'll get a copy of your plan and a letter with the reasons for the decision we made. If your plan was varied, you'll get a copy of your varied plan within 7 days of the day the variation to your plan starts.¹¹⁰ If we approved a new plan you'll get a copy within 7 days of your plan being approved.¹¹¹

Your local area coordinator, early childhood partner or support coordinator can help you start using your plan. For example, they can explain the supports in your plan, help you connect with supports outside the NDIS, and help you find service providers.

Learn more about [your plan](#).

What if I am not happy with my plan?

If you're not happy with your new plan, you should talk to your local area coordinator, early childhood partner, support coordinator or planner. They may be able to explain our decision or help you with any questions. It's a good idea to do this soon after you get your new plan.

You can also [contact us](#) to ask about the reasons for our decision to approve your plan.

If you don't agree with your new plan or varied plan, you can ask us to review our decision. We call this process an internal review.¹¹² This means another one of our staff, who wasn't involved in the original decision, will look at whether we made the right decision.

It's up to you to decide whether you want an internal review. We don't decide this for you.

You need to ask for an internal review of our decision within 3 months of receiving our decision. We can't do an internal review if you ask us after 3 months has passed. If you ask us after 3 months, we'll let you know what other options you have. Learn more about [reviewing our decisions](#).

Reference list

- ¹ NDIS Act and delegated legislation made under the NDIS Act, especially NDIS (Supports for Participants) Rules and NDIS (Plan Management) Rules.
- ² NDIS (Supports for Participants) Rules r 5.1(b).
- ³ NDIS Act s34(1)(a).
- ⁴ NDIS Act s34(1)(b).
- ⁵ NDIS Act s34(1)(c).
- ⁶ NDIS (Supports for Participants) Rules r 3.1(c).
- ⁷ NDIS Act s34(1)(c); NDIS (Supports for Participants) Rules r 3.1(a).
- ⁸ NDIS Act s34(1)(d).
- ⁹ NDIS Act s34(1)(e).
- ¹⁰ NDIS Act s34(1)(f).
- ¹¹ NDIS Act s34(1)(f).
- ¹² NDIS (Supports for Participants) Rules part 5.
- ¹³ NDIS (Supports for Participants) Rules r 5.1(a).
- ¹⁴ NDIS (Supports for Participants) Rules r 5.1(b).
- ¹⁵ NDIS (Supports for Participants) Rules r 5.1(c).
- ¹⁶ NDIS (Supports for Participants) Rules r 5.1(d).
- ¹⁷ NDIS (Supports for Participants) Rules r 5.3(a).
- ¹⁸ NDIS (Supports for Participants) Rules r 5.3(b).
- ¹⁹ NDIS Act s34(1)(f).
- ²⁰ NDIS Act s118(1)(b).
- ²¹ NDIS Act s4(17)
- ²² NDIS Act s33(2).
- ²³ NDIS Act s33(5)(a).
- ²⁴ NDIS Act s34(1)(a).
- ²⁵ NDIS Act s34(1)(d).
- ²⁶ NDIS (Supports for Participants) Rules r 4.1(d).
- ²⁷ NDIS Act s34(1).
- ²⁸ NDIS Act s34(1)(d); NDIS (Supports for Participants) Rules, rr 3.2-3.3.
- ²⁹ NDIS Act s34(1)(c); NDIS (Supports for Participants) Rules r 3.1.
- ³⁰ NDIS Act.s33(1)
- ³¹ NDIA Act.s33(2)
- ³² NDIS Act s33(2)(c)
- ³³ NDIS Act ss47; 47A
- ³⁴ NDIS Act s48
- ³⁵ NDIS Act s47A.
- ³⁶ NDIS Act s47A(1)
- ³⁷ NDIS Act s47A(2)
- ³⁸ NDIS Act 47A(9)
- ³⁹ NDIS Act s47A(3)
- ⁴⁰ NDIS Act s47A(1)(a)(ii)
- ⁴¹ NDIS Act s47A(1A)(a)
- ⁴² NDIS Act s47A(1A)(iii).
- ⁴³ NDIS Act s47A(1A)(b)
- ⁴⁴ NDIS Act s47A(1A)(c)
- ⁴⁵ NDIS Act s47A(1A)(c)
- ⁴⁶ NDIS Act s47A (1A)(c)
- ⁴⁷ NDIS Act s47A(1A)(d)
- ⁴⁸ NDIS Act s47A(1A)(d)(i)
- ⁴⁹ NDIS Act s47A(1A)(d)(ii)
- ⁵⁰ NDIS Act s47A(1A)(d)(iii)
- ⁵¹ NDIS Act s47A(1A)(d)(iv)

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- 52 NDIS Act s48(1)
53 NDIS Act s48(2)
54 NDIS Act s48
55 NDIS Act s48(7)
56 NDIS Act s41(2)(c)
57 NDIS Act s47(1)
58 NDIS Act s47(3)
59 NDIS Act s47(2)
60 NDIS Act s47(2).
61 NDIS Act s47(1)(note1)
62 NDIS Act. s47(A)(4)(a)
63 NDIS Act s47(A)(4)(b)
64 NDIS Act s47(A)(4)(d)
65 NDIS Act s47A(4)
66 NDIS Act s100(1).
67 NDIS Act s47A(8)(b)
68 NDIS Act s47A(8) and 50.
69 NDIS Act s50(2)(a)
70 NDIS Act s50(2)(b)
71 NDIS Act s99(1) Item 6, 6A, 6B
72 NDIS Act s48(3)(a)
73 NDIS Act.s48(3)(b)
74 NDIS Act s48(3)(a)
75 NDIS Act s48(3)
76 NDIS Act s 99, Items 6 and 6C; s100(1).
77 NDIS Act s99(1)item 6C
78 NDIS Act s48(4); 100(1A)(a)(ii)
79 NDIS Act ss48(4), 100(1A)(a)(ii)
80 NDIS Act s48(7)(b)(i)
81 NDIS Act s48(7)(b)(ii).
82 NDIS Act s47A
83 NDIS Act s47A
84 NDIS Act s48
85 NDIS Act s48(6)
86 NDIS Act s49
87 NDIS Act s49(1)(b)(ii)
88 NDIS Act s49(1)(b)(i)
89 NDIS Act s47A; s33(2)
90 NDIS Act s99(1)item 6,6A, 6B,6C
91 NDIS Act s49A
92 NDIS Act s49
93 NDIS Act s47A(11).
94 NDIS Act s38.
95 NDIS Act s47(3)
96 NDIS Act s47A(10)
97 NDIS Act s48(7)(b)(i)
98 NDIS Act s48(7)(b)(ii)
99 NDIS Act s33(5)(f).
100 NDIS Act s50(2).
101 NDIS Act s50(3).
102 NDIS Act s50(3).

103 NDIS Act s48(3)(c)

¹⁰⁴ NDIS Act s41(2)(c).

¹⁰⁵ NDIS Act s47A(1)

¹⁰⁶ NDIS Act s41(2)(c)

¹⁰⁷ NDIS Act s48 (2)

¹⁰⁸ NDIS Act s48 (2)

¹⁰⁹ NDIS s101

¹¹⁰ NDIS Act 47A(11)

¹¹¹ NDIS Act s38

¹¹² NDIS Act s100.