

The contents of this document are OFFICIAL.

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 you need a change. If you do, 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 changes are needed. We will then either update your current 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.

Note: when we say 'your plan' we mean your NDIS plan. If you are looking for information about your community connections plan, go to [Our guideline – Community Connections](#).

If you are looking for information about your child's early connections plan, go to [Our Guideline – Early Connections](#).

What's on this page?

This page covers:

- [What principles do we follow to create your plan?](#)
- [What do we mean by changing your plan?](#)
- [How can I ask for a change to my plan?](#)
- [What happens after I request a change to my plan?](#)
- [When do we decide to change your plan?](#)
- [How do we make a change to your plan?](#)
- [How can I prepare for my plan change?](#)
- [When would we decide not to change your plan?](#)

OFFICIAL

- [What happens after I have had a change to my plan?](#)

You may also be interested in:

- [Reviewing our decisions](#)
- [Creating your plan](#)
- [Reasonable and necessary supports](#)
- [Your plan](#)

OFFICIAL

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.

We aim 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 relates 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

OFFICIAL

- the support is likely to be effective and beneficial for you, having regard to good practice and evidence⁸
- you require the support 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 NDIS and not more appropriately funded by another service system, agency, person or body, such as the education system or the health system.¹⁰ 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:¹¹

- it is likely to **cause harm** to you or others¹²
- it **doesn't relate** to your disability¹³
- it **duplicates** other supports delivered by the NDIS¹⁴
- 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 needs¹⁵
- providing the support would be **against the law**¹⁶
- it consists of **income replacement**¹⁷
- it is the **responsibility of other service systems** to provide (for example, your state government, the education system, or the health system).¹⁸ These different systems have different responsibilities and are meant 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?

As the NDIS is an insurance scheme one of our core functions is to manage the financial sustainability of the Scheme.¹⁹

When we decide what supports we fund in your plan, we must also think about maintaining the **financial sustainability of the NDIS**.²⁰

This means we must work within our funding budget, set through agreements between the Australian, and State and Territory governments.

The NDIS is only one part of the broader National Disability Strategy that supports people living with disability.

OFFICIAL

OFFICIAL

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 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 means 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 think about 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 make sure the total cost of all participant plans are within the overall NDIS budget set by governments.

Each support in your plan must be reasonable and necessary. 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.²¹ Information about what supports we'd usually include in your plan helps guide this process.

This information also helps to guide the consistency of our decision-making process. We use it to check your overall plan and make sure all your supports make sense together. We'll

OFFICIAL

OFFICIAL

check 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:

- information you share with us
- 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.²² The supports we fund need to help you increase your independence and pursue your goals.²³ This means your supports should help overcome any disability-specific barriers which may stop 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](#). Not all supports that help you to pursue your goals will be reasonable and necessary.

There are a few things you should know about setting your goals:

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'.

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.

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.

OFFICIAL

OFFICIAL

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 and in line with current good practice.²⁴ This means we check if there is evidence the support is effective and beneficial, for someone with similar disability support needs.

For example, we may already have information about whether the support is widely accepted to suit someone with your disability support needs.²⁵ 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,²⁶ we won't fund the support.

You can find out more about the types of evidence we need 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 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 any of the following:

- your current functional capacity
- the effectiveness of the capacity building supports²⁷
- value for money.²⁸

When we say functional capacity, we mean the things you can and can't do for yourself.

Your overall funding amount could go down from one plan to the next. This 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, as you develop your skills you may not need as many 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.

OFFICIAL

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. We need to think about 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 the needs that arise, from an impairment that meets the same eligibility requirement we consider at [Access](#).

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

We fund the right disability supports for your permanent impairments which meet our Access criteria. By doing this we make sure the system is fair for everyone, and 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, Work safe, Lifetime Care and Support 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.'²⁹ Your plan also has information about:

- any supports we'll give you
- the supports we'll pay for
- how your funds and the other parts of your plan will be managed.

OFFICIAL

We call this the 'statement of participant supports.'³⁰ Learn more about [creating your plan](#).

Every plan must include a plan reassessment date.³¹ 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](#). You don't have to wait until the reassessment date. [We can also decide to change your plan](#) at any time if we think we need to. 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](#).³² Or we can decide to approve a new plan for you after a plan reassessment.³³ 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, you can ask for an internal review of our decision. You won't be able to ask for a plan change 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?

A plan variation is where we make changes to your current plan. We can make changes to your current plan without doing a plan reassessment. There are only certain situations when we can do this. The law for the NDIS tells us what these situations are.³⁴ If we decide to vary your plan, we'll prepare the varied plan with you.³⁵

We can vary your plan if you ask us to or if we think you need a plan variation.³⁶ 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.³⁷ We'll let you know what parts of your plan we decide to change. If the plan change is about funding in your plan, the varied plan still must meet the [NDIS funding criteria](#).³⁸

We can vary your plan 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.³⁹ 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 we've made 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.

OFFICIAL

OFFICIAL

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

Change the reassessment date of your plan⁴⁰

How far in the future a reassessment date is set in a plan isn't the same for everyone. Your plan reassessment date will be specific to you and your situation, though it will generally 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 changes to the statement of participant supports in your plan.⁴¹

Case example

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

At Fatima's last check-in, she and her planner discussed her current plan is working well. At the time Fatima requested her current supports continue for the next 12 months. No changes were made during her check-in as her plan was near its reassessment date.

When developing Fatima's next plan, her planner suggests they continue her plan for 3 years. Fatima's planner can see that she has found providers she is working well with and she is working towards her goals. Her current supports have been working well over the past 12 months and are likely to continue to meet her support needs.

At the plan meeting, Fatima and her planner discuss continuing her plan. Fatima would like to continue with her current supports. Fatima's planner approves a variation to her reassessment date. Fatima's plan will continue with the same supports for the next 3 years. Fatima's planner also tells her that if her situation changes, she can contact the NDIS.

Update how the funds or other aspects of your plan are managed⁴²

The statement of supports in your plan describes how the funds or other aspects of your plan are managed. We can update this information. Learn more about [how we decide how funding is managed](#).

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

OFFICIAL

OFFICIAL

It's important to note that if you want a registered 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 registered 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 provided⁴³

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.⁴⁴ We can only do this if the statement of supports in your current plan specifies that a support must be provided in a certain way.⁴⁵ Learn more about [when we specify supports](#).

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

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. As a result he requires some intensive supports provided by 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.

Before Toby could start these sessions his speech therapist moved interstate unexpectedly. His therapist did provide a referral to Toby for a different suitably qualified AAC trainer.

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

Toby requests 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. Toby's planner maintains the frequency of how often the service is provided as previously stated. No other changes were needed in Toby's plan.

Change the statement of participant supports that is in your current plan, or of the funding of supports under the plan⁴⁶

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 needs⁴⁷](#)
- [we receive information or reports after your plan has started that we requested to help us prepare or approve your statement of supports⁴⁸](#)

OFFICIAL

OFFICIAL

- [we need to make an adjustment due to a change to the reassessment date of the plan](#)⁴⁹
- [we make a minor variation to your plan which increases your funding](#).⁵⁰

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

When something unexpected happens in your life, we may be able to vary your plan to add emergency supports. Or we may 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 do 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 while you have these supports. 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. Along with this we may decide to 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 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.

OFFICIAL

OFFICIAL

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

We receive information or reports 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 creating your plan with you we may request additional information. This could be something like an occupational therapist assessment and report which describes your assistive technology needs. We receive this report after we approve 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, there may be situations where we also need to make other changes to your plan. This could be to the statement of supports which is how your supports are explained, 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 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 get a job opportunity, we may add specific employment supports rather than do a plan reassessment so you don't miss this opportunity.

OFFICIAL

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 he 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.⁵¹ Just like a plan variation we can reassess your plan if you ask us to. We can also do a plan reassessment on the CEO's own initiative if we think it is needed.⁵²

When we do your plan reassessment, we can decide to create a new plan or we can decide to vary your current plan.⁵³ This will depend on your situation.

For example, we may do a plan reassessment and decide to create a new plan 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

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.

OFFICIAL

You'll need to give us any new information to help us decide if we'll do a plan change. The information we need can depend on the reason you're asking for a plan change. This may include any assessments, reports, or other evidence. This evidence could come from your doctor, an occupational therapist, a psychologist, or a support provider. These are important to help us understand how your situation has changed. Learn more about the [types of evidence we can use when we create your plan](#).

You can give us any new evidence about your support needs when you get it. If you're not sure what to give us, you can talk to your My NDIS contact. You can also give us new evidence during your [check-in](#).

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'll likely need an assessment or report from an appropriately qualified professional about how your support needs have changed. This may be your doctor, a specialist, or an allied health professional like an occupational therapist.

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, you may just want to change who manages your funding. In this case 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 record the details of the person you have given consent to. This means anyone who looks at your record can see it.

Learn more about [consent](#).

You can't request a change to your plan if your plan is suspended.⁵⁵ Learn more about [plan suspensions](#).

OFFICIAL

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.⁵⁶ 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.⁵⁷ The change results in a varied plan, rather than a new plan.⁵⁸ 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 you 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.⁵⁹

We might make other changes to your plan if you ask for a variation or reassessment of your plan.⁶⁰ 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 plan⁶¹
- not vary your plan⁶²
- let you know we need more time to decide.⁶³

We have to make our decision about your plan variation request within **21 days** of receiving your request.⁶⁴ We'll send you a letter telling you what our decision is and the reason for it.⁶⁵

There may be times we'll tell you that we need more time to decide. When we do, then we must either vary the plan or decide not to vary the plan as soon as reasonably practicable.⁶⁶ What is reasonable will depend on whether we have requested any information or reports.⁶⁷ We may ask you to provide more information to help us make our decision⁶⁸. Or we may ask you to get an assessment or examination, or both and provide us with a report or reports.⁶⁹

If we request more time to make our decision, we will decide whether to vary your plan within 28 days. Or we may take 50 days to decide 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.⁷⁰ Learn more about [internal reviews](#).

Request for a plan reassessment

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

- vary your plan⁷¹
- reassess your plan⁷²
- not reassess your plan.⁷³

Just like plan variations, we have to make our decision about your plan reassessment request within **21 days** of receiving your request.⁷⁴

We will send you a letter telling you the outcome of our decision. If we decide to vary your plan, or not reassess your plan, we will provide you with reasons for our decision.⁷⁵ 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.⁷⁶ Learn more about [internal reviews](#).

If we don't make a decision about your request to change your plan within **21 days**, we are taken to have decided not to conduct a reassessment of your plan. This decision will be automatically reviewed.⁷⁷ We call this an automatic internal review. We'll let you know in writing if we do an automatic internal review.⁷⁸ 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)⁷⁹ or
- prepare and approve a new plan.⁸⁰

When do we decide to change your plan?

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

- your plan needs a [variation](#)⁸¹ - for example, to make changes to plan management, emergency funding is required or there is a mistake in your plan we need to fix.⁸²
- your plan needs [reassessment](#)⁸³ - 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're doing.⁸⁴

We must also reassess your plan before the reassessment date in your plan.⁸⁵ 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 plan⁸⁶ or vary your current plan,⁸⁷ depending on your situation. The variation to your plan, or new plan, will be prepared with you.⁸⁸

OFFICIAL

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.⁸⁹ Learn more about [internal reviews](#).

Sometimes a plan will say that in certain circumstances we must reassess the plan.⁹⁰ 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 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 which 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.⁹¹

If we decide to change your plan, we must provide you with a copy of your:

- varied plan **within 7 days** of the variation taking effect⁹²
- new plan **within 7 days** after your plan comes into effect.⁹³

There may be times where you only want to change your statement of goals and aspirations. When you do, we will provide you with a copy of your varied plan **within 7 days** of receiving your changed statement.⁹⁴

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

OFFICIAL

How do we make a change to your plan?

We'll work with you to change your plan. We'll think about which type of plan change will 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 we may look at different things. This depends on what type of change we're doing, and the sort of changes we're making.

The length of time from the start of a plan to the reassessment date won't be for the same for everyone, though it will generally be 3 years. 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 given us 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.⁹⁵

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)⁹⁶
- prepare and approve a new plan.⁹⁷

When we do a plan reassessment, we think about all the information we have about you, your goals, situation, and support needs. If we create a new plan, we reassess all the

OFFICIAL

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.⁹⁸ 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've had using your funding and help you to get support to address these problems. If you consistently don't use your NDIS funding, we'll 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?

Sometimes we may ask for more information or an assessment, if we need them to help us work out your support needs when we change your plan.⁹⁹ This helps us understand what support you need. We'll ask for different types of information for different types of supports. 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. For example, an occupational therapist may write a letter to explain why you need a specific type of wheelchair.
- more information about the types of support you need, and how often you need it, from a suitably qualified person such as your doctor or psychologist.
- information from a provider about how you have progressed towards your goals.

The most important information we gather about what supports to include in your plan comes from you. We collect this information during [check-ins](#). You can also give us this information anytime there is a change in your situation.

OFFICIAL

OFFICIAL

We must give you a reasonable opportunity, and a reasonable amount of time, to give us the information.¹⁰⁰ We'll review the information you give us to make sure the supports meet the [NDIS funding criteria](#). 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.¹⁰¹

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

Learn more about [the evidence we need before we change your plan](#).

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 [Participant booklets](#) 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, an occupational therapist, a doctor, or a support 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. 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.

OFFICIAL

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. We also need to think about the reason you are asking for a plan reassessment. For example, we wouldn't do a plan reassessment¹⁰²:

- [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 or evidence 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.

Remember you can give us new information or evidence anytime there is a change in your situation.

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.

OFFICIAL

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 childcare¹⁰³
- 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.¹⁰⁴

If your plan is suspended

We also can't do a plan change if your plan has been suspended.¹⁰⁵ 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?

The law for the NDIS describes the times we can do a plan variation.¹⁰⁶ Learn more in [what is a plan variation](#).

We'll decide not to vary a plan if the request doesn't meet the [NDIS funding criteria](#), or the following reasons.

For example:

- your plan is suspended or ceased¹⁰⁷
- you have flexible funding left in your plan that can be used
- we can't look at the variation without 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.

OFFICIAL

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 My NDIS contact or support coordinator about how they can help you get other supports you may need.

If you don't agree with our decision not to change your plan, 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.¹⁰⁸ You can also ask for a participant-requested plan change.¹⁰⁹

We may 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.¹¹⁰ 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 my plan has been changed?

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.¹¹¹ If we approved a new plan you'll get a copy within 7 days of your plan being approved.¹¹²

Your My NDIS contact 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 plan, you should talk to us when you get your varied plan or when we meet with you to approve your new plan. We can explain the decision, clarify how you can use the funding, or help you fix any problems.

You can also talk to your My NDIS Contact or support coordinator. It's a good idea to do this soon after you get 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.¹¹³ 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](#).

Version Control Table

Version	Amended by (login ID)	Brief Description of Change	Status	Date
1.0	GO0002 LS0042	Class 2 approval 3P version for Tasmania Test Links updated for 3P	APPROVED	2022-10-28

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 (Supports for Participants) Rules part 5.

¹² NDIS (Supports for Participants) Rules r 5.1(a).

¹³ NDIS (Supports for Participants) Rules r 5.1(b).

¹⁴ NDIS (Supports for Participants) Rules r 5.1(c).

¹⁵ NDIS (Supports for Participants) Rules r 5.1(d).

¹⁶ NDIS (Supports for Participants) Rules r 5.3(a).

¹⁷ NDIS (Supports for Participants) Rules r 5.3(b).

¹⁸ NDIS Act s34(1)(f).

¹⁹ NDIS Act s118(1)(b).

²⁰ NDIS Act s4(17)

²¹ NDIS Act s33(2).

²² NDIS Act s33(5)(a).

²³ NDIS Act s34(1)(a).

²⁴ NDIS Act s34(1)(d).

²⁵ NDIS (Supports for Participants) Rules r 4.1(d).

²⁶ NDIS Act s34(1).

²⁷ NDIS Act s34(1)(d); NDIS (Supports for Participants) Rules, r 3.2-3.3.

²⁸ NDIS Act s34(1)(c); NDIS (Supports for Participants) Rules r 3.1.

²⁹ NDIS Act s 33(1)

³⁰ NDIA Act s 33(2)

³¹ NDIS Act s 33(2)(c)

³² NDIS Act ss 47; 47A

³³ NDIS Act s 48

³⁴ NDIS Act s 47A.

³⁵ NDIS Act s 47A(1)

³⁶ NDIS Act s 47A(2)

³⁷ NDIS Act s 47A(9)

³⁸ NDIS Act s 47A(3)

-
- 39 NDIS Act s 47A(1)(a)(ii)
 - 40 NDIS Act s 47A(1A)(a)
 - 41 NDIS Act s 47A(1A)(iii).
 - 42 NDIS Act s 47A(1A)(b)
 - 43 NDIS Act s 47A(1A)(c)
 - 44 NDIS Act s 47A(1A)(c)
 - 45 NDIS Act s 47A (1A)(c)
 - 46 NDIS Act s 47A(1A)(d)
 - 47 NDIS Act s 47A(1A)(d)(i)
 - 48 NDIS Act s 47A(1A)(d)(ii)
 - 49 NDIS Act s 47A(1A)(d)(iii)
 - 50 NDIS Act s 47A(1A)(d)(iv)
 - 51 NDIS Act s 48(1)
 - 52 NDIS Act s 48(2)
 - 53 NDIS Act s 48(7)
 - 54 NDIS Act s 48
 - 55 NDIS Act s 41(2)(c)
 - 56 NDIS Act s 47(1)
 - 57 NDIS Act s 47(3)
 - 58 NDIS Act s 47(2)
 - 59 NDIS Act s 47(2).
 - 60 NDIS Act s 47(1)(note1)
 - 61 NDIS Act s 47(A)(4)(a)
 - 62 NDIS Act s 47(A)(4)(b)
 - 63 NDIS Act s 47(A)(4)(d)
 - 64 NDIS Act s 47A(4)
 - 65 NDIS Act s 100(1).
 - 66 NDIS Act s 47A(8)(b)
 - 67 NDIS Act s 47A(8) and 50.
 - 68 NDIS Act s 50(2)(a)
 - 69 NDIS Act s 50(2)(b)
 - 70 NDIS Act s 99(1) Item 6, 6A, 6B
 - 71 NDIS Act s 48(3)(a)
 - 72 NDIS Act s 48(3)(b)
 - 73 NDIS Act s 48(3)(a)
 - 74 NDIS Act s 48(3)
 - 75 NDIS Act s 99, Items 6 and 6C; s100(1).
 - 76 NDIS Act s 99(1)item 6C
 - 77 NDIS Act s 48(4); 100(1A)(a)(ii)
 - 78 NDIS Act ss 48(4),100(1A)(a)(ii)
 - 79 NDIS Act s 48(7)(b)(i)
 - 80 NDIS Act s 48(7)(b)(ii).
 - 81 NDIS Act s 47A
 - 82 NDIS Act s 47A
 - 83 NDIS Act s 48
 - 84 NDIS Act s 48(6)
 - 85 NDIS Act s 49
 - 86 NDIS Act s 49(1)(b)(ii)
 - 87 NDIS Act s 49(1)(b)(i)
 - 88 NDIS Act s 47A; s33(2)
 - 89 NDIS Act s 99(1)item 6,6A, 6B,6C
 - 90 NDIS Act s 49A
 - 91 NDIS Act s 49
 - 92 NDIS Act s 47A(11).
 - 93 NDIS Act s 38.
 - 94 NDIS Act s 47(3)

⁹⁵ NDIS Act s 47A(10)

⁹⁶ NDIS Act s 48(7)(b)(i)

⁹⁷ NDIS Act s 48(7)(b)(ii)

⁹⁸ NDIS Act s 33(5)(f).

⁹⁹ NDIS Act s 50(2).

¹⁰⁰ NDIS Act s 50(3).

¹⁰¹ NDIS Act s 50(3).

¹⁰² NDIS Act s 48(3)(c)

¹⁰³ NDIS Act ss 33(5)(d), 35(1)(a); NDIS (Supports for Participants) Rules r 5.1(d).

¹⁰⁴ NDIS Act s 34(1)(e).¹⁰⁴

¹⁰⁵ NDIS Act s 41(2)(c).

¹⁰⁶ NDIS Act s 47A(1)

¹⁰⁷ NDIS Act s 41(2)(c)

¹⁰⁸ NDIS Act s 48 (2)

¹⁰⁹ NDIS Act s 48 (2)

¹¹⁰ NDIS s 101

¹¹¹ NDIS Act 47A(11)

¹¹² NDIS Act s 38

¹¹³ NDIS Act s 100.