

# decision chart for NDIS review (update ) of plans

## Unscheduled review

do NOT create a new plan  
start and end dates remain unchanged  
review date (end of plan) remains unchanged

Update ONLY the section(s) being reviewed

## Scheduled review

Perform full review

generate new plan with  
new start and end dates  
next review time is moved to near end of new plan

Every section reviewed and management style set for each section

New amounts and management styles can be changed for each section as required

### Update procedure for unscheduled review:

Is this a Once off change ?  
(see next page for examples)

Or Ongoing Change?  
(see next page for examples)

adds funds to section to be updated ONLY  
no proportioning required to any part of plan

proportion new funds to be added to time remaining in plan  
ie no of days remaining in plan divided by total length of plan  
times the amount to be added  
NB. This is the only time prortioning is done and it is ONLY to the added section

Leave rest of plan the same

submit a preview of new plan to participant for their approval (in case of errors like forgetting to tick the management style in a section so self managed turns into NDIA managed)

**examples of a once off include:**

to add funds to purchase a piece of equipment like a wheelchair

or to add funds to cover an urgent assessment amount

or to pay for an item of equipment or home maintenance

May subtract those funds spent, or remove funds altogether for the item if in plan

Is this an update to add a set amount of funds

expected to be fully used in current plan?

..eg to pay for 12 weeks of therapy, when plan is longer than 12 weeks

**Examples of not once off include all those funds quoted as yearly mounts and ongoing**

An increase in social and community funding - ongoing

An increase in therapy funding not all to be used within the remaining part of the plan but quoted as a yearly amount