

Request an NDIS therapy report

Written for the participant to send. If writing for someone else, adapt I and my, identify the participant and add any clinic reference requested. Give your role and explain their agreement or the authority relevant to the request.

Subject: Report request for [NDIS process or purpose] - [date, if confirmed]

Hi [clinician name],

I'm preparing for [confirmed NDIS process or conversation] on [date / date still being checked]. Could we discuss an appropriate report to help explain [my priorities, goals or support changes]?

The main changes or questions are [relevant dated examples and what is working or difficult]. I would like the report to address [questions or areas of daily life].

Could you confirm what kind of report you can prepare within your role, whether you need an appointment or assessment, and which existing information would help? Please also let me know the cost, what is included and the payment arrangements before work starts.

I'm hoping to review a final report by [needed-by date]. What completion date can you agree to? If that timing or scope is not possible, please let me know what you can offer and when.

I'd like [me / chosen reviewer] to read it in [preferred format] before wider sharing. Please send it to [agreed recipient] through [agreed secure method]. I can provide [relevant records or observations] through the method you recommend.

Thank you,

[Name and contact details / role if writing for the participant]

Check on the report request

Choose the wording for an unanswered request or work already accepted. Refer to an agreed completion date only if the clinician confirmed one.

Subject: Update on the report for [agreed purpose]

Hi [clinician name],

I'm following up on [my request sent on date / the report you agreed to prepare on date] for [purpose]. [The completion date we agreed was date / We have not yet confirmed whether you can take this on.]

Could you let me know the current position, whether you need anything from me, and what completion date is realistic? I hope to review the final report by [needed-by date].

If you cannot provide it within that scope or timing, please let me know what is possible. I can then speak with my NDIS contact about the outstanding information and how to proceed.

Thank you,

[Name and contact details / role if writing for the participant]

Check the report when it arrives

Review the report with the participant in their preferred way, with chosen support if wanted. Ask the author about corrections or unclear findings, then confirm the current version and sharing arrangements.

Participant / clinician / report received on:

Report title / author / date / draft or final version:

Agreed purpose and questions / addressed or still missing:

Participant review / preferred format or chosen support / date:

Factual details checked / question or correction for the author:

Author contacted / accepted follow-up owner / next check:

Final or corrected version / author confirmation / current location:

Sharing: information / recipients / purpose / consent or other lawful basis checked:

Representative authority for this task, if relevant / checked by:

Separate NDIA sending step, if needed / agreed sender / method / date:

Documents and versions sent / receipt or reference / next check if unclear:

Outstanding work / accepted owner / next action and timing:
