NDIS Plan Review Checklist and Reassessment Evidence Tracker

Turn changes, goals, reports and follow-ups into one clear preparation picture: what may be relevant, who is contributing it, when it is needed, what is still waiting and which file is ready to review.

People often search for an NDIS plan review. The current official term is usually plan reassessment. This coordination tool does not decide what evidence is required or what the NDIS will fund. Confirm the process and what information may be relevant with your my NDIS contact and appropriate professionals.

Start in three minutes

1. Write one sentence about what has changed, what is working and the question you want the next conversation to answer.
2. Confirm the process and any relevant date with your my NDIS contact. A check-in, reassessment, variation and review of a decision are not interchangeable.
3. Add the first potentially relevant item to the tracker with one owner, one status and one next check. You can refine the rest with the participant and contributors.

Which process is happening?

Check-in

A check-in is a conversation with the NDIS about how the current plan is going and whether it still meets the participant's needs. Having a check-in does not automatically mean the plan will change. It is a useful point to discuss goals, current supports, changes in daily life and questions for the next plan.

Plan reassessment

A plan reassessment is the process used when the NDIA considers whether a new plan, a variation or no change is appropriate. The information and evidence considered depends on why a change is being discussed. A person can talk to the NDIS about changed needs without waiting for a scheduled date.

Plan variation

A variation changes part of the current plan in circumstances allowed by the NDIS rules. It is generally used for a smaller change rather than replacing the whole plan. The NDIA decides which plan-change pathway applies after considering the request and information provided.

Internal review of a decision

An internal review is a separate process for asking the NDIA to reconsider a reviewable decision. It is not another name for a plan reassessment. If a decision letter is involved, use the current NDIS review page and the letter itself to check the decision, options and time limit; this resource is not legal advice.

An adaptable preparation checklist

Use this as a flexible sequence. Confirm the real process and dates, then adjust to the participant's choices and each contributor's lead time.

- [ ] **As soon as a change or upcoming reassessment is known**

  Confirm what process is happening, the date that matters and what the my NDIS contact says is needed. Write down who confirmed it and when so the team is not working from different assumptions.

- [ ] **During early preparation**

  Record the participant's priorities, what has changed, what is working, what is difficult or missing, current goals and the specific questions the preparation should help answer. Use the participant's own words where possible and agreed.

- [ ] **Before requesting reports or assessments**

  Agree which information may be relevant, who is appropriate to contribute and what lead time they need. Ask whether an appointment, assessment, consent, payment or existing record is required before promising a date.

- [ ] **While items are underway**

  Give every request an owner, expected contributor, requested date, needed-by date, current status, waiting reason and next check. A request marked waiting should always say what it is waiting on and who will check next.

- [ ] **When an item arrives**

  Confirm the participant details, author, date, draft or final state, agreed purpose and current file. Record who should review it and whether clarification is needed instead of treating every received file as ready.

- [ ] **Before sharing or meeting**

  Confirm the participant or authorised decision-maker knows what is included, sharing is limited to the agreed purpose and people, the current versions are obvious and the submission or meeting questions are ready.

- [ ] **After the conversation**

  Record what was provided, any receipt or acknowledgement, open questions, the decision when known and the next follow-up. Close requests that are complete, superseded or no longer needed so old work does not look active.

Build the evidence map around purpose

Change or goal > question > potentially relevant information > appropriate contributor > request > review > current pack

Possible information, organised by purpose

- [ ] Participant voice, goals, preferences and what a good outcome would mean in daily life.
- [ ] What has changed in the participant's situation, functional impact, support needs or circumstances.
- [ ] What is working well and should stay visible when the current plan is discussed.
- [ ] Practical examples of barriers, gaps, risks or unmet needs connected to the question being considered.
- [ ] Supports tried, the outcomes observed and the reasons something did or did not work.
- [ ] Recommendations, assessments or quotes where they are relevant to the agreed question.
- [ ] Current plan, community, mainstream and informal-support context the NDIA has asked to consider.

What each contributor can usefully provide

Participant, family or nominee

- What has changed and what a normal day now looks like.
- What is working, difficult, missing or likely to change soon.
- New or continuing goals and the questions the participant wants answered.
- What the participant agrees can be requested, reviewed and shared, and with whom.

Support coordinator or recovery coach

- A current preparation map tied to the participant's priorities and confirmed process.
- Progress, barriers and coordination context within the coordinator's role.
- Clear requests to the people best placed to contribute, with realistic dates.
- A participant-controlled current pack, including disclosed role boundaries or conflicts where relevant.

Allied-health professional

- Service and assessment context, goals addressed and intended outcomes.
- Progress and measurable outcomes where appropriate, including functional impact and barriers.
- What has been tried, the evidence supporting recommendations and the expected outcome.
- A final report shared with the participant and handled through the agreed consent and record systems.

Support worker or provider team

- What support was delivered and what was directly observed.
- Specific examples connected to the agreed question, goal or daily-life change.
- Progress, barriers or patterns, with enough context for the appropriate reviewer.
- A short contribution for the participant or relevant professional to review before it is relied on.

Printable evidence tracker worksheet

Use one card per potentially relevant item. Four blank cards are provided; copy or print this page again if needed. Do not add sensitive detail unless the participant has agreed to this storage and sharing method.

Evidence item 1

Item / information requested

Change, goal or question | why it may be relevant

Requested by / expected from

Requested / needed-by / status

Waiting reason / next check

Current file / location

Reviewer / review outcome

Next action

Evidence item 2

Item / information requested

Change, goal or question | why it may be relevant

Requested by / expected from

Requested / needed-by / status

Waiting reason / next check

Current file / location

Reviewer / review outcome

Next action

Evidence item 3

Item / information requested

Change, goal or question | why it may be relevant

Requested by / expected from

Requested / needed-by / status

Waiting reason / next check

Current file / location

Reviewer / review outcome

Next action

Evidence item 4

Item / information requested

Change, goal or question | why it may be relevant

Requested by / expected from

Requested / needed-by / status

Waiting reason / next check

Current file / location

Reviewer / review outcome

Next action

Request prompts and meeting questions

Every request should state the participant-approved purpose, one question, the item requested, a realistic needed-by date, an earlier feasibility check and the agreed return method.

Request a report or assessment

Purpose: ______ Question: ______ Request: ______ Needed by: ______ Feasibility check: ______ Return method: ______ If outside role/timeframe: please tell us by ______

Request a practical progress summary

Purpose: ______ Question: ______ Request: ______ Needed by: ______ Feasibility check: ______ Return method: ______ If outside role/timeframe: please tell us by ______

Request clarification or the final current version

Purpose: ______ Question: ______ Request: ______ Needed by: ______ Feasibility check: ______ Return method: ______ If outside role/timeframe: please tell us by ______

Questions for the meeting or check-in

- [ ] What process are we in and what date matters?
- [ ] What information has the NDIA asked for, and what question should it help answer?
- [ ] Is anything unclear, missing, duplicated or no longer relevant?
- [ ] How should information be provided and how will receipt be confirmed?
- [ ] Who should attend or be available, and what does the participant want them to contribute?
- [ ] What will happen next, how will the decision be communicated and when should we follow up?

Readiness, follow-through and official sources

Purpose and relevance

- [ ] Each item connects to a current change, goal or question.
- [ ] The participant and appropriate people have agreed it may be relevant.
- [ ] Unnecessary requests are closed instead of being chased.

Currency and review

- [ ] The current version, author, date and draft or final state are obvious.
- [ ] Participant details and the agreed purpose are correct.
- [ ] The appropriate person has reviewed it or a specific clarification is open.

Participant voice and sharing

- [ ] The participant or authorised decision-maker knows what is included.
- [ ] Sharing is limited to the agreed purpose, people and method.
- [ ] Professional records remain in the professional's required system.

Follow-through

- [ ] Waiting items have an owner, reason and next check.
- [ ] The submission or meeting method is confirmed.
- [ ] Someone will record what happens next and close completed work.

Afterwards

- [ ] Record what was provided, when and by which agreed method.
- [ ] Keep a receipt, acknowledgement or dated note where one exists.
- [ ] Record open questions and the person responsible for the next check.
- [ ] Treat a plan outcome and an internal review of a decision as separate processes.
- [ ] Close completed, superseded or unnecessary preparation items so the current picture stays trustworthy.

Official guidance last checked 26 August 2026

What is a plan reassessment	https://www.ndis.gov.au/participants/changing-your-plan/types-plan-changes/what-plan-reassessment
How to prepare for a plan reassessment	https://www.ndis.gov.au/participants/changing-your-plan/types-plan-changes/how-prepare-plan-reassessment
Checklist: changing your plan	https://www.ndis.gov.au/media/6414/download?attachment=
What is a check-in	https://www.ndis.gov.au/participants/changing-your-plan/your-next-plan/what-check
Guide to changing your plan	https://www.ndis.gov.au/participants/changing-your-plan/types-plan-changes/guide-changing-your-plan
How to write a plan reassessment report	https://www.ndis.gov.au/providers/working-participants/allied-health-professionals/how-write-plan-reassessment-report
What is a decision review	https://www.ndis.gov.au/participants/changing-your-plan/decision-reviews/what-decision-review
How to share your plan with a provider	https://www.ndis.gov.au/participants/working-providers/arranging-supports/how-share-your-plan-provider