Plan reassessment checklist

Suggested preparation for a plan reassessment. Agree dates and evidence with your team.

For participants and families

12 weeks before

- [ ] Note the reassessment date from the plan or the my NDIS portal.
- [ ] List what's worked and what hasn't in the current plan.
- [ ] Write down goals for the next plan, in your own words.

8 to 10 weeks before

- [ ] Ask relevant providers what progress reports are needed and what they cost.
- [ ] Agree any necessary assessments, costs and available funding before booking.
- [ ] Collect quotes for equipment, home modifications or new supports.

4 to 6 weeks before

- [ ] Read the reports and check they reflect your goals and needs.
- [ ] Check budget use with the plan budget tracker.
- [ ] With consent, share relevant reports with your coordinator or NDIS contact.

At the check-in

- [ ] Bring your goals, reports and questions.
- [ ] Describe a typical week, including hard days.
- [ ] Ask about next steps, plan dates, funding periods and available funds.

Suggested preparation, not a deadline or funding decision. Confirm dates, costs and requirements with your team.