

# End of Plan Reviews

What you need to know when your plan is about to finish!



Firstly, a plan “rollover” is now an outdated NDIS term, and can be confused to mean \*any\* of the types of new plans I’ve explained below in this post, so we are just not gonna use that word (rollover) anymore, and instead we’ll use the more “official” NDIS terms for the different types.

## **Auto-extension, Renewal, Light Touch Renewal or Full Review**

This handout is about the options for when your plan dates are ending. This post does **not** cover when you ask for a review because you are unhappy with your fairly new plan (review of a reviewable decision) or when you are requesting a change of circumstances review.

### **1. Plan Auto-Extension**

A genuine plan extension is the “default” option and what happens when your plan is set to expire and no one at the NDIA or the LAC has done anything to get you a new plan. When you get a Plan Extension, it is usually automatic for one year (though it can sometimes be one month or anything in between).

A plan extension does NOT give you a “new” plan, and in fact, the pdf plan you can download on the NDIS MyPlace portal doesn’t change one little bit (even though the actual end date is now different).

But, you’ll notice in the other parts of your portal, that the end date has changed, and a pro-rata amount of funding has been added. Plan extensions usually happen when there hasn’t been any other human intervention, or sometimes when a planner is working on your new plan but it’s not quite finished yet, so your plan is automatically extended for one year, with duplicate funding amount added.



If you have a Plan Extension, the money left in your plan remains, and extra money is put in as pro rata.

*An example:* If you have an old \$12,000 plan which “expired” 14<sup>th</sup> August 2021, and you still had \$6,000 left that you didn’t use: if your plan is extended by a year, there should now be a new plan end date of 14th August 2022, and there should be around \$18,000 in that plan (and the start date won't change from your old plan!). And yes, you can still claim for stuff dated anytime between August 14 2020 and August 14 2022.

Often the Agency uses these Extension Plans as a stop-gap, until they get your new plan all sorted and approved. That’s because, under the NDIS Act (the law!) an NDIS plan never ends until it is replaced with a new one, or the participant “exits” the scheme, and that’s why we have Plan Auto-Extensions – to be rid of those awful plan gaps we used to see, which were always against the law. Grrr...

## 2. Plan Renewal

A Plan Renewal is when you get a whole new plan (usually one or two years long) which is basically a repeat of your current, about to expire old plan. This generally needs you, the participant, to approve it. This can be a great option for people who are happy with their old plan, and don’t want to be assed going through a full plan review.

These Renewal Plans *\*are\** a whole new plan, so *\*none\** of the leftover funds from your old plan are available for supports and services dated during the new plan dates.

The new plan usually starts when the old plan was set to end, but sometimes planners bring this forward a bit sooner, which can be frustrating if you’ve been saving your funds to get something at the end of your old plan.

So – if you’re talking to an LAC or planner and are keen for a Renewal Plan, make sure to ask them to wait until you’ve been able to purchase that larger “end of plan” thing. And... if you’re not confident about them holding off, then jump in and get that service/support sorted as soon as you can! When this Renewal Plan starts, you will still be able to makes claims (from the old plan) for things you bought during the dates of the old plan, for up to 90



days after the start of the new plan on the portal (for self managers), and Plan Managers should be able to do the same.

You should also get a whole new pdf plan to download in the NDIS MyPlace portal with a new start and new end date.

### 3. Light Touch Plan Renewal

This one is pretty much the same as the full Renewal Plan (#2 above), except a planner or an LAC might have a chat with you, often on the phone or sometimes even via email, in what feels like a “review-lite” meeting. The planner or LAC will just check in if there are any relatively easy changes that need to be made. You might find that your plan funds increase due to this “chat”, but you might also find you lose some funding – an example might be someone who has already had SLES funding for two years, so it is left off of the new Light Touch Plan Renewal.

One typical change for a Light Touch Plan Renewal, for example, is that equipment that you’ve already received during the current plan isn’t going to be repeated and funded again in the new Renewal Plan, or newly required equipment might be added.

### 4. Full Plan Review

This is the regular full plan review meeting – on phone or in person where you go through \*all\* the “stuff” with an LAC, ECEI partner or planner, and they build you a whole new plan. For these reviews, you’ll generally want/need to provide therapist reports and other evidence of your support needs, your carer statement and all that stuff (check out Plan Review #4 – Getting Ready for Review).

Generally, young children will usually get a full plan review, and fewer Renewal Plan options, as little tackers’ needs are pretty changeable through early intervention. This also often applies where a participant has a plan the Agency thinks was well funded for a specific time-limited purpose (or therapy program, for example), and for folks in this boat, you’re also unlikely to be offered a Renewal Plan.




## So, how do you get the type of review you want?

Have a think about which of the above options will work for you.

Once you've decided, and you're maybe two or so months out from the end of your current plan, call your local LAC, or call (1800 800 110) or email the NDIS on [enquiries@ndis.gov.au](mailto:enquiries@ndis.gov.au) and let them know what you'd like. There are no guarantees that you will get your choice, of course, but there's probably no harm in giving it a crack.

And don't forget, if your new Plan doesn't give you what you need, you can nearly always ask for a Review of a Reviewable Decision (also known as a RORD or S100 Review). This doesn't apply if you have an auto-extension, in which case you can only ask for a Change of Circumstances Review!

Wishing you all the best! Sorry this is so messy, and long.

My Plan is about to end! What are my options?		Plan Auto-Extension	Plan Renewal	Light-Touch Plan Renewal	Full Plan Review
Do I have a full Planning Meeting?		No	No	No	Yes
Do I have a shorter conversation or chat with my LAC or Planner?		No	Yes	Yes	Yes
What Plan will happen if I haven't had any contact with my LAC or planner and my <i>old</i> plan is ending?		Yes	No	No	No
Can I ask my LAC or Planner for this kind of <i>new</i> Plan? (they <u>don't</u> have to say yes, by the way)		No	Yes	Yes	Yes
Can I get a <u>two year</u> Plan?		No	Maybe	Maybe	Maybe
Will my funding in the <i>new</i> Plan be pretty much pro-rata of my <i>old</i> Plan?		Yes	Yes	Some Changes	Unlikely
Do I get a <i>new</i> Plan with a new start date on the portal?		No	Yes	Yes	Yes
Can I use up leftover funds from current Plan for stuff I purchase during the <i>new</i> plan?		Yes	No	No	No
Can I still make claims from my <i>old</i> Plan for supports and services I bought before the <i>new</i> Plan started with leftover funding?		Yes	Yes	Yes	Yes
Will my <i>new</i> Plan end early?		No	Maybe	Maybe	Maybe
Will this <i>new</i> Plan last the full time?		Maybe	Maybe	Maybe	Maybe
What Plan am I likely to get for my young (ECEI) child?		Maybe	Unlikely	Unlikely	Yes
Can I ask for a review of a reviewable decision within three months if I'm not happy with the <i>new</i> or <i>extended</i> Plan?		No	Yes	Yes	Yes
Do I need to provide therapy reports?		No	Unlikely	Maybe	Yes

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