



Easy Read

Assessment, Planning and Review Policy and Procedure

1 Purpose 🎯

We want to make sure:

- We understand each participant's needs ✅
 - We make a plan that suits them 📅
 - We check progress regularly 👁️
 - Support is high quality and person-centred ❤️
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2 Who This Is For 👥




This policy is for all staff who:

- Assess participants 📄
- Make plans 📄
- Review progress ↺




Includes: Support Coordinators, Social Workers, and admin staff.

3 What Words Mean 💬

- **Assessment:** Finding out what the participant needs, likes, and can do ✨
- **Planning:** Making a plan to help them reach their goals 🏠
- **Review:** Checking progress and updating the plan if needed ↺
- **NDIS Plan:** The participant's official plan with goals, supports, and funding 💰








- **Person-Centred:** Listening to what the participant wants and values 
 - **Forms:**
 - **Participant Care and Support Plan:** Documents needs, goals, and support strategies 
 - **Action Plan:** Shows steps, priorities, and support strategies 
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Responsibilities

- **Directors:** Make sure systems are in place and follow NDIS rules 
 - **Staff & Support Coordinators:** Assess, plan, and review with participants 
 - **Participants & Families:** Share info, give feedback, and help with planning 
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How We Do It

5.1 First Assessment





- Done when a participant starts with us 
- Gather info on:
 - Goals and dreams 
 - Abilities and support needs 
 - Risks and safety 
 - Culture, values, and preferences 
 - Priorities 
- Use **Participant Care and Support Plan** and **Action Plan** to record info 

- Complete Risk Assessment within 3 months 
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5.2 Planning

- Make a plan based on the assessment 
 - Plan should:
 - Match participant goals and NDIS funding 
 - Show how to manage risks 
 - Explain roles for staff and participant 
 - Be easy to read 
 - Share plan with participant and family 
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5.3 Doing the Plan

- Give support according to the plan 
 - Record progress and challenges 
 - Make changes if participant feedback or needs change 
 - Update tasks in **Amendment to Action Plan** form 
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5.4 Reviewing

- Review when:
 - New NDIS plan comes 
 - Major incidents or life changes happen 
- Check:
 - Progress towards goals 
 - Effectiveness of support 

- Any risks or unmet needs ⚠️
 - Update plans if needed 📄✍️
 - Include participant and family 👤👨👩
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5.5 Record Keeping 💾

- Store all plans securely in OneDrive & Splose 🔒
 - Keep info private and confidential 🗨️
 - Make records easy to find for audits or NDIS checks 🔍
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5.6 Continuous Improvement 📈

- Use feedback from participants, families, and staff 💬
 - Track trends, risks, and outcomes 📊
 - Improve how we assess, plan, and review 🔧
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6 Policy Review 🔄

- Review every 2 years 📅
 - Or sooner if:
 - NDIS rules change ⚖️
 - Feedback shows improvement needed 💡
 - Our systems or processes change ⚙️
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✅ This is your Easy Read guide to Feedback and Complaints.
If you want the **full policy**, please ask us.