



Assessment, Planning and Review Policy and Procedure (Simple English)

1. Purpose

This policy explains how we:

- Assess each participant's needs accurately
 - Create plans tailored to the participant
 - Check progress and update plans regularly
 - Deliver high-quality, person-centred support following NDIS standards
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2. Scope

This policy applies to all staff who:

- Assess participants
- Plan and review supports
- Keep records and documentation

This includes Support Coordinators, allied health providers, and administrative staff.

3. Definitions

- **Assessment:** Finding out the participant's goals, needs, strengths, risks, and preferences
 - **Planning:** Making a personalised plan to achieve the participant's goals
 - **Review:** Checking progress and updating the plan if needed
 - **NDIS Plan:** The participant's approved plan with goals, supports, and funding
 - **Person-Centred Approach:** Listening to the participant's choices, preferences, and values
 - **Forms:**
 - **Participant Care and Support Plan:** Documents needs, goals, and strategies
 - **Action Plan:** Outlines priorities and steps for support
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4. Responsibilities

- **Directors:** Make sure systems are in place and follow NDIS standards
- **Staff & Support Coordinators:** Assess, plan, and review supports with participants

- **Participants & Families:** Contribute to discussions and provide feedback
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5. Procedures

5.1 Initial Assessment

- Done when a participant first engages with us
- Collect information on:
 - Goals and aspirations
 - Current abilities and support needs
 - Safety and risk concerns
 - Culture, values, and preferences
 - Priorities
- Record in **Participant Care and Support Plan, Action Plan, and Risk Awareness Assessment**
- Risk assessment completed within 3 months

5.2 Planning

- Make an individual plan using assessment results
- Plans must:
 - Match participant goals and NDIS funding
 - Include strategies to manage risks
 - Clarify roles for staff and participant
 - Be easy to understand
- Share plans with participants and families
- Record all tasks in **Action Plan**

5.3 Implementation

- Provide supports according to the plan
- Record progress, support activities, and any challenges
- Make adjustments if participant needs change
- Update **Amendment to Action Plan** as needed

5.4 Review

- Conduct reviews when:
 - A new NDIS plan is received
 - Major incidents or life events occur
- Review steps:
 - Check progress towards goals
 - Assess effectiveness of supports
 - Identify unmet needs or risks
 - Update plans as needed
- Include participants and families in the review

5.5 Record Keeping

- Store records securely in OneDrive and Splose
- Keep information private and confidential

- Ensure records are easy to retrieve for audits or reporting

5.6 Continuous Improvement

- Collect feedback from participants, families, and staff
 - Monitor trends, risks, and outcomes
 - Use information to improve assessment, planning, and review processes
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6. Policy Review

- Review every 2 years, or sooner if:
 - NDIS rules or legislation change
 - Feedback shows improvement is needed
 - Organisational systems or practices change
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7. References

- NDIS Practice Standards
 - NDIS Quality & Safeguards Commission Guidelines
 - Privacy and Confidentiality Policy
 - Risk Management Policy
 - Participant Care and Support Plan
 - Action Plan
 - OneDrive and Splose systems
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