Preparing for your NDIS plan reassessment

A simple checklist of the records that help, plus what has changed under the 2026 NDIS reforms.

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What's changed

27 August 2026
Only you, your nominee or child representative can ask for an early reassessment. The NDIA has 90 days to decide.

Coming soon
New record keeping rules. Participants keep records for 3 years, nominees 5 years and providers 7 years. Start date to be confirmed.

1 October 2026
Social, Economic and Community Participation and Improved Daily Living Skills budgets are reduced at reassessment.

1 February 2027
Plan renewal replaces plan continuation. Unspent funds no longer carry over.

Your records checklist

- **Goals and progress**
  What you have achieved and what you want next
- **Therapy reports**
  Focused on day to day impact, with clear recommendations
- **Provider reports**
  Progress notes from support workers and programs
- **Medical letters**
  From your GP or specialist if your needs have changed
- **Service agreements**
  Current versions, including any rate changes
- **Invoices and receipts**
  For your full plan period
- **Spending history**
  With reasons for any underspending or overspending
- **Changes in your life**
  Health, home, work, school or carer changes

When to start

3 months out
Book therapy reports

2 months out
Gather agreements, invoices and a budget summary

1 month out
Check for gaps and write your questions

Check-in
Bring your documents and a support person

Afterwards
Ask for a summary and keep using your plan

For support coordinators

- You can no longer submit a reassessment request, but you can help your client prepare it.
- Prompt clients to book reports around 3 months ahead.
- Help explain any gaps in spending, especially in budgets now being reduced.

How plan management helps

We keep your invoices, payments and spending history in one place, so your records are ready when your check-in comes around.

Call us on 1300 634 776