

# NDIS Plan Reassessment Report Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

**An NDIS plan reassessment report (progress report)** is the document a treating allied health provider writes toward the end of a participant's plan period: supports delivered, progress against a functional baseline on named measures, and recommended supports argued to the reasonable and necessary criteria (NDIS Act s 34). No law or NDIA rule mandates the report or a template. Give the finished report to the participant, who shares it with the NDIA. Most run 3 to 6 pages.

**Participant, provider and service pattern** frequency of contact is evidence

**Do:** state the plan period, first and most recent service dates, and total sessions; tribunals have preferred treating clinicians with dozens of contacts over one-off assessors.

**Pitfall:** omitting frequency and duration of contact, the very fact that gives your observations their weight.

**Supports delivered this plan period** delivered versus funded

**Do:** report support type, frequency, setting and attendance against what the plan funded, linked to the goals each support served.

**Pitfall:** a therapy diary; the delegate needs the delivery account and goal linkage, not session narratives.

**Functional baseline and outcome measures** no baseline, no progress

**Do:** restate the start-of-plan baseline and repeat the same named instruments at reassessment (WHODAS 2.0, goal attainment scaling; no measure is mandated).

**Pitfall:** progress claims with no baseline or instrument; change cannot be shown without a starting point.

**Progress toward each goal** function, not diagnosis

**Do:** give the measured change goal by goal, say what it means functionally, and explain every goal not achieved.

**Pitfall:** evidence that explains the condition instead of how it affects daily activities, the dominant documented reason NDIS evidence falls short.

**Barriers, risks and informal supports** s 34 looks at the whole picture

**Do:** record barriers and how you addressed them, risks and how they are managed, and the informal, community and mainstream supports in place.

**Pitfall:** silence on informal supports; the criteria make them part of the funding test.

**Recommendations and release** argue the criteria, then hand over

**Do:** argue each support against the reasonable and necessary criteria with frequency, duration and expected outcomes, then give the report to the participant and record the date.

**Pitfall:** recommendations stated as preferences, or the report posted to the NDIA over the participant's head.

## Before you sign

- ☐ Function leads; the diagnosis is named once, never argued
- ☐ Baseline, endpoint and instrument named for every claim
- ☐ Every unmet goal has an explanation
- ☐ Contact pattern stated: first, most recent, total sessions
- ☐ Each recommendation argued to the s 34 criteria
- ☐ Informal and mainstream supports addressed
- ☐ Report given to the participant; date recorded

## Drafting with AI

Give it the plan goals, session notes and outcome scores; it drafts the report with the baseline restated, progress measured goal by goal, and every recommendation argued to the criteria.

*"Draft an NDIS plan reassessment report: three goals, WHODAS 32 to 21, one goal interrupted by admission, fortnightly psychology next plan."*

**Never paste participant-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.**

**3 to 6 pages**  
1,200 to 3,000 words

**2 to 4 hours**  
clinical team estimate

**Participant controls release**  
give the report to them

**s 34 criteria**  
decide the funding

# NDIS Plan Reassessment / Progress Report Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Participant (initials): \_\_\_\_\_ NDIS number: \_\_\_\_\_ Plan period: \_\_\_\_\_

Author (name, credentials, registration): \_\_\_\_\_ First service: \_\_\_\_\_ Most recent and total sessions: \_\_\_\_\_

## Supports delivered this plan period

Support type · frequency · setting · attendance · linked plan goals

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## Functional baseline and outcome measures

Instrument, date and score at plan start · repeat measure at reassessment

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## Progress toward each goal

Measured change · functional meaning · explain any goal not achieved

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## Barriers, risks and informal supports

Barriers addressed · risks managed · informal, community and mainstream supports

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## Recommendations for the next plan

Support, frequency, duration · reasonable and necessary justification · expected outcomes

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Provided to participant on: \_\_\_\_\_ Signature and credentials: \_\_\_\_\_ Date: \_\_\_\_\_