



# Local Coordination Operational Policy – Review of Plans

## Purpose

This Policy outlines the approach to the review of Individual Plans (Plans) in Local Coordination.

## Scope

This Policy applies to all Local Coordination areas and is applicable to people with disability accessing Local Coordination support.

## Principles

The individual with a disability is central to the planning and review processes. The planning and review processes include people who are known and trusted by the individual such as family members, carers and/or their representatives.

The review process will provide an opportunity for all involved to share and discuss outcomes, new goals and strategies, and approaches for the future.

Planning will incorporate individualised strategies that encourage, support and prioritise the use of informal and local community connection.

Planning may identify a requirement for formal supports and services; however, these are most effective when they are complementary to, and strengthening of, informal natural relationships and connections in the individual's life.

## Introduction

Plans developed in Local Coordination are reviewed at least once every 12 months or as required dependent on the length of the plan. This review is to ascertain the individual's view about whether the strategies and supports included in their plan assisted them to achieve their plan goals. The views of others will also be considered where this is requested by the individual.

A plan review is triggered by various circumstances outlined in the Local Coordination Operational Procedure – Review of Plans.

For individuals eligible for the Australia-wide National Disability Insurance Scheme (NDIS), planning with the individual and/or their family member/representative is to be guided by the individual's transition to the NDIS.

Local Coordinators are to continue planning with an individual and/or their family member/representative when the individual's current plan is due for review or where changed need has been identified, and if the individual is eligible for the NDIS but has not commenced planning with the National Disability Insurance Agency (NDIA).

The review is undertaken with the individual with disability and any other people they wish to include or who may have relevant information. The individual may be represented by a person informally selected (such as a parent or spouse) or by formal appointment (such as a Guardian or Administrator, to the degree that it reflects the terms of the formal appointment). See also Local Coordination Operational Policy - Supported Decision-Making.

## Introduction

Other than the initial plan, a new plan can be endorsed only following the review of the existing plan.

A plan review is triggered by one of the following:

1. In accordance with the review date as indicated in the individual's plan being:
  - no longer than 12 months from the plan's endorsement date
  - a period less than 12 months from the plan's endorsement date nominated at that time, as coinciding with anticipated life event points or a set of identified circumstances.
2. As requested by the individual and/or their family member/representative, or initiated by the Local Coordinator in response to:
  - change of goals which necessitate a change of plan strategies
  - change of life situation
  - change in funding request
  - change of disability service provider which results in a change of goals, change of strategies or change of funding
  - as a result of plan monitoring activities
  - the funding being used for a completely different purpose or goal than for which it was originally approved and allocated
  - change in status related to eligibility requirements
  - change in plan management.

## Areas for plan review

The plan review seeks to determine how well plan strategies have assisted the individual to achieve their goals and their satisfaction with the chosen strategies and supports.

The individual, with the Local Coordinator and relevant others if appropriate, will consider the plan in relation to achievement of goals.

## Plan changes

In some circumstances the plan may require changes to address:

- an unexpected short-term change of need
- a change in service provider (without change in funding or goals).

A change to the current plan does not necessarily require a plan review and development of a new plan. However, a full review and development of a new plan should be considered if the change is likely to be significant and ongoing.

Sometimes there is a need to progress a plan so that the individual can commence receiving some of the supports and services in a timely manner while the other strategies continue to be developed, or negotiations (regarding approval, or funding or service model for example) continue.

Completion of reviews and the development of new plans can be impacted by a range of factors and circumstances outside of the control of Local Coordination staff. If services are due to expire before a new plan is in place, approval for a service extension must be requested to ensure continuity of services. The Regional Manager will approve the service extension request informed by reasons documented by the Local Coordinator and Area Manager.

A request for a service extension should only be approved if supported by current circumstances. The service extension process is an exception to the normal plan review process. A service extension does not necessarily negate the need to complete a review on the individual plan. Funding through this process will be for a period to be determined to ensure an individual's safety and wellbeing can be maintained whilst the plan review is completed and a new plan is approved, where required or until such time as the individual has an approved NDIA plan.

## **Eligibility status review**

Where there is a change in an individual's circumstances which results in the eligibility requirements no longer being met, the individual is no longer able to access Local Coordination support. This change, identified either by the individual and/or their family/representative or the Local Coordinator, initiates a plan review and potentially cessation of support.

## **Responsibilities**

Compliance with this policy is mandatory.

## **Other related documents**

- Local Coordination Planning Framework
- Local Coordination Operational Procedure – Review of Plans
- Local Coordination Operational Policy - Plan Development and Plan Changes
- Local Coordination Operational Policy - Supporting Decision Making
- Local Coordination Operational Procedure – Service Extension Request

## Document control

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Feedback and enquiries relating to this Policy may be directed to [programsupport@communities.wa.gov.au](mailto:programsupport@communities.wa.gov.au) .

This document can be available in alternative formats on request.

## Amendments

Version	Date	Author	Description
1.0		Program Support	Review by 30/06/2016
1.1	01/07/2017	Program Support	Review by 01/07/2018
1.2	15/03/2018	Program Support	Review by 13/03/2020
1.3	20/07/2020	Program Support	Review by 20/07/2022
1.4	16/10/2020	Program Support, State-wide Services, Community Services Division	Review by 16/10/2022