

SUPPORT COORDINATOR GUIDE

Best practice: writing for the NDIS

Five rules for creating strong, evidence-based reports & assessments



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Why should you read this guide?

One of the most basic rules of the National Disability Insurance Scheme (NDIS) is that nothing gets moving without a proof. Before making any funding decision, the agency running the scheme, NDIA, asks for a raft of formal evidence from therapists, doctors and other health professionals. These experts help the agency develop a better understanding of the circumstances and needs of anyone who seeks its support.

Most of this evidence must be submitted in writing. Unfortunately, participants, support coordinators and health professionals are not always clear on how to do this. There are myriads of official forms and templates available on the NDIS portal. Some are mandatory, others merely offer guidance to therapists, who can then apply their own style and structure to written NDIS assessments and reports.

To end some of the confusion and create a more streamlined system, the NDIA recently announced that it would stop accepting functional capacity assessments from private therapists in 2021. Instead, it wants to engage independent assessors to document the day-to-day challenges a person with disability faces when communicating, moving around or being social. This

means the NDIS will soon collect this critical information on its own terms using its own benchmarks.

But functional assessments are just one piece in the puzzle. Participants and would-be participants still get to hand in many other evidential reports over the course of their NDIS journey. As a Support Coordinator you can help them.

You can help participants collect clear & strong reports

For example, participants still need an occupational therapist to help them formulate goals for next plan review meeting. They still need experts to back up requests for a new wheelchair or other assistive technology, or explain why moving into a disability-friendly high-tech home with NDIS funding would be justified.

What are the must-have elements in such reports? Which words and terms should you use to help an NDIS Planner make the right funding decision for a participant you assist?

>> [This quick guide will help you understand the do's and don'ts of writing for the NDIS.](#)

The basics

What type of written evidence can Support Coordinators assist with?

As a Support Coordinator, your job is to assist families living with a disability who are already in the NDIS. For this reason, this guide won't discuss any of the diagnosis and disability reports Australians need to produce when they first apply for the scheme.

Existing participants need to hand in fresh evidence whenever their circumstances or support needs change. If changes are substantial, participants will need to demonstrate again how they're able to perform everyday tasks at this moment in time.

While all functional capacity assessments will be conducted independently by agency-appointed assessors from 2021, there are still four other major pieces of written evidence that Support Coordinators can help to organise for participants.

Reports you can assist with:

1 Plan review therapy reports

Whether you request an unscheduled plan review or wait for the next scheduled one, a planning meeting is a critical opportunity to discuss with an NDIS Planner what kind of funding should be included in the participant's next plan.

It pays off to walk into the plan review meeting well prepared. An [occupational therapist](#) can help you to set the right goals and outline the corresponding support needs in a therapy report.



You can also use our free, interactive **Plan Review Preparation tool** to talk participants through the core questions an NDIS Planner will ask:

www.providerchoice.com.au/plan-reviewer



2 Assistive technology assessments

From shower chairs to adaptive pencil grips – participants can buy common low-risk technology under \$1,500 with funding from their core supports budget.

However, if they want to buy more costly, more complex high-tech equipment or if they want to modify their home or car with NDIS funding, they will need to ask a specialist to back up their request with a written assistive technology (AT) assessment.

You can get an AT assessment from an [occupational therapist, physiotherapist, speech pathologist, psychologist, rehabilitation engineer](#) or other suitably qualified practitioner. The NDIA has published different templates for writing AT assessments (click [here](#)).

3 Housing report

The NDIA estimates that only 6% of all participants are eligible to receive funding for Specialist Disability Accommodation (SDA). To apply for this type of funding, participants need to submit a formal housing report. Such a report is typically [written by an occupational therapist](#) specialising in disability-friendly housing.

Summer Foundation has published a great template ([click here](#)) for writing this report.

4 Carer impact statement

A Carer statement is a letter [written by someone who cares for a person with disability](#). It basically outlines how caring for the participant affects the carer and others around them. While it's not compulsory to submit this statement, it certainly helps the agency get a fuller understanding of a participant's support needs.

Carer statements can make a difference in funding, for example, to get respite included in a plan. Carers Australia has a useful checklist for this letter ([click here](#)).

Who pays for these reports?

All these reports and assessments can be paid for with funds for Capacity Building under the plan category 'Improved Daily Living'. In the past, participants had to pay for functional capacity assessments themselves. This will change in 2021. The new independent functional assessment process will be fully paid for by the NDIS.

Getting the language right

Writing for the NDIS requires a specific type of language. It requires a therapist or health professional to use words that go beyond the usual terminology of diagnosis, treatment, therapy and rehabilitation.

This is because the primary role of these reports and assessments is to provide evidence that assists the decision-makers at the NDIS.

Everything comes down to two words: ‘reasonable’ and ‘necessary’

The agency’s planners will browse any report they receive for typical NDIS-related terms that help them determine whether it is really **reasonable and necessary** to pay for the recommended support with taxpayer money.

What does this ‘reasonable and necessary’ principle mean?

It means the agency will test every funding decision it makes for its appropriateness. It will ask whether it is reasonable and necessary to fund a specific support because it would help the participant manage life more easily and achieve his or her personal goals. Or – that’s the counter-scenario – because not providing the funding would put the participant and/or their carers at risk.

What makes a good goal?

Support Coordinators and occupational therapists can help participants set appropriate NDIS goals. These goals determine how much funding they’ll receive, and what for. The best goals are broad and don’t limit a participant’s choices.

- | | |
|--|---------------------------------------|
| + I want to increase my community | ⊗ I want to learn to drive |
| + I want to be more independent at home | ⊗ I want to learn to do the gardening |
| + I want to improve my health and wellbeing | ⊗ I want to play netball |
| + I want to improve my relationships with family and friends | ⊗ I want to medicate my child |

Five rules for writing excellent NDIS reports and assessments

1. Clearly link back to NDIS goals

The NDIS is a goals-driven disability scheme. It seeks to empower people with a significant, lifelong disability in Australia and help them live a fuller life.

This is important to remember when writing one of the reports we discuss in this brief guide. All recommendations and therapy goals stated in such a report need to link back to the life goals a participant wants to achieve with the help of the NDIS.

Sienna's case

Sienna is an NDIS participant with a primary intellectual disability. She is often hyperactive and has trouble making herself understood. This at times makes Sienna physically aggressive, creating conflict with her carers.

A therapy report for the NDIS should address how her disability limits her daily activities, function and participation before setting out therapy targets and supports that relate to her NDIS goals.

Best-practice writing for the NDIS	Example for 'reasonable & necessary'
<p>"Sienna's intellectual disability has resulted in a permanent cognitive-communication impairment. She has difficulty with comprehension and verbal communication This is severely limiting Sienna's ability to have conversations with her parents and her carers..."</p>	<p>Goal: Improving relationships with family and friends</p> <p>Supports to achieve goal:</p> <ul style="list-style-type: none">• speech therapy to build her capacity for verbal communication;• behaviour therapy to ensure the safety and wellbeing of Sienna and her family/carers

2. Include measurable targets

An excellent report for the NDIS doesn't stand out for its persuasion skills or dramatic writing. It stands out because it provides the NDIS Planner with quantifiable information to make a funding decision.

Effective reports are very specific in describing the need, goals and outcome targets of a participant. This will help the agency measure a participant's progress from one plan to the next.

Example:

“The goal is to help Sienna improve her verbal communication skills by 50% by increasing her capacity to clearly pronounce basic conversational commands from 20 to 30 through speech therapy of 2 x 1.5-hour sessions per week with her and her support staff.

This 50% improvement would support her in reaching her goals of increasing her social participation and improving her relationships with family and friends.”

3. Give strong, specific recommendations

The most effective reports make it easy for the NDIS Planner to find what is being proposed. They list the core support recommendations right at the start and in detail.

Example:

- Recommended therapy hours per week
- Technical equipment details
 - Price (and price of alternative models, including non-assistive technology)
 - Model number
 - Frequency of use
 - Potential trial periods and outcomes
 - Evidence for its effectiveness and potential risk

4. Answer the reasonable & necessary test

Effective reports help the agency determine whether the recommended supports satisfy every criteria of the reasonable and necessary test. The report should answer each of the six questions below:

1. Do you need it because of your disability?
2. Does it help you meet your goals?
3. Is it reasonable value for money?
4. Is there evidence that it works?
5. Is it a support you couldn't receive from family or a community service?
6. Is the NDIS the right government scheme to fund this support?

5. State the risk

Much of the report will inevitably focus on the benefits a participant should expect if the NDIS were to fund the recommended supports. However, an equally important consideration would be to outline to the agency the risk of not funding this support. What would happen?

Which effect would you expect on the participant's (and carer's) wellbeing, health and safety? A negative effect or deterioration in the current circumstances would add to the evidence about why a proposed support is not just reasonable, but truly necessary.

Further reading:

- Summer Foundation (2018), [Getting the Language right](#)
- VALID (2018), [10 steps to excellent NDIS therapy reports](#)
- NDIS official [templates for Assistive Technology Assessments](#)
- Sample letters for [Carer Impact Statements](#)

Who is Provider Choice?

We are NDIS experts. We provide plan management services and easy-to-use technology for all NDIS participants.

If you have any plan management questions or queries, please get in touch with:

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