Knowledge Article

For Internal Use Only

The contents of this document are OFFICIAL.

Book change or cancel a check-in

Guidance in this document is not approved for use unless you view it in PACE.

This article provides guidance for a planner delegate, planner (non-partnered area), review officer, participant support officer, local area coordinator or early childhood partner to:

- contact the participant to book their check-in meeting
- book a check-in meeting
- review or change a check-in meeting
- reschedule a check-in
- reassign a check-in
- cancel a check-in meeting.

Recent updates

16 June 2025

Updated guidance to include link to How to create an anonymous Microsoft Teams Meeting when booking a virtual check-in.

5 May 2025

Updated guidance to:

- remove and replace transition streamlined planning articles
- clarify what to expect at a plan transition check-in
- understand that we don't offer the plan continuation pathway to participants with a plan moving from SAP CRM to PACE
- include new guidance on supporting participants in times of change.

Before you start

You have read and understood:

- article Understand types of check-ins
- article Check authority to book an appointment

- article Check consent, nominee, child representative or self-representation authorities
- article Contact attempts and unable to contact in a check-in case
- Guide – Conversation style guide and Conversations with participants in a changing environment (PDF 122KB) to help you support participants.

You have:

1. Checked if there are any open check-in cases on the Person Account. Review the check-in case and decide to continue with this check-in case or cancel and close this case.
2. Opened an assigned check-in case or created a discretionary check-in case. To learn more about:
    - scheduled check-ins, including transition and reassessment check-ins, go to article Understand types of check-ins. Continue with this auto-created case
    - how to create a discretionary check-in case, go to article Create a check-in case.
3. Completed a desktop review using article Complete a desktop review before a check-in.
4. Prepared for the check-in conversation using article Explain the purpose and outcomes of a check-in.

Contact the participant to book their check-in meeting

Where possible, you should offer a face-to-face meeting with the participant (or their authorised representative). If that's not possible or appropriate, offer a virtual meeting using Microsoft Teams (MS Teams) or phone. Make sure you accommodate the participant's preferences about how they want to meet.

Note: if you're booking a meeting with the participant via MS Teams, you'll need to generate a meeting link in Outlook. Use the guide How to create an anonymous Microsoft Teams meeting.

Check-ins usually take around 45 minutes but this will depend on the participant's needs.

When you set a check-in date more than 60 days away, it’s a placeholder date only. PACE will automatically create a check-in case when there is 60 days until the check-in. This will be assigned to the participant’s my NDIS contact.

Before you contact the participant, check their preferred contact method. Go to article Check a person's preferred contact method.

Before you call the participant, send them an SMS to let them know you're going to call from a private number, within the hour. Go to article Send an SMS in PACE.

When you reach the participant, introduce yourself and explain the purpose of the call or email is to schedule a check-in. Use article Explain the purpose and outcomes of a check-in to support this conversation. Talk with the participant about:

- what a check-in is and why it's important
- the reason for the upcoming check-in. For example, to discuss any changes in their situation or how their plan is working for them before their plan reassessment
- what time suits them and how long the check-in might take. You might suggest some dates and times
- who they'd like to attend the meeting, for example an informal support or support coordinator
- what communication support they may need at the check-in.

To help the participant prepare ask if they'd like the following resources. You can talk through them, give them a copy or send a link:

- How will we check-in with you during your plan? (external)
- Factsheet: Check-ins (external)
- Our Guideline – Your plan (external).

You should explain the kinds of things you might discuss during the check-in. For example:

- how they're going
- if they have any questions about their current plan
- how they're going using their funding
- how they're going with their goals, if they've any new goals or want to change their goals
- how they're using community or mainstream supports and if they need support to connect with these
- how they're using the NDIS supports in their plan
- how their NDIS supports are helping them pursue their goals
- if their NDIS supports meet their disability needs
- if their situation has changed

- if they need help with big changes coming up in their life, like starting or finishing school or starting a new job
- anything else the participant would like to discuss.

Talk to the participant about what they might like to have ready for the meeting. For example, any updates to their About Me information, any new evidence or supporting documents. If their situation has changed, help the participant understand what types of information we'll need from them. You can use Factsheet: Evidence you need to give us before we create or change your plan (external) to support the conversation.

Offer to send the participant the information you've explained after the call, for example in an email. This should include the purpose of the check-in, what you might discuss and what they might like to have ready for the meeting.

Plan transition check-in

If you're booking a plan transition check-in, explain what this will mean for the participant. Let them know what you'll discuss and what the next steps will be. You can let the participant know that we'll only offer a plan reassessment after a transition check-in, and not a plan continuation. To learn more about what you'll discuss and record during a plan transition check-in, go to article Complete a SAP CRM to PACE plan transition.

Reassessment check-in

If you're completing the last check-in before a scheduled plan reassessment, this is called a reassessment check-in.

A reassessment check-in case is generated 116 days before the participant's plan reassessment date. This is generated for participants with a confidence level not suitable for a plan continuation without a check-in. The participant will receive an auto-generated letter to let them know we want to arrange a check-in meeting and what the next steps are after this check-in.

Explain to the participant that we may ask for extra information at this check-in. Talk to them about what will likely happen after this check-in. For example:

- if their situation hasn't changed and their plan meets their needs, the planner delegate may decide to continue their plan
- if their situation has changed and we have evidence their plan isn't meeting their disability-related support needs, the planner delegate may decide to reassess their plan.

This decision will be based on all available evidence, including the information gathered during this check-in.

When you schedule the check-in, make sure you give the participant and the Agency enough time to gather any new and updated information.

Local area coordinators or early childhood partners have 50 days to complete a reassessment check-in. Planner delegates have 60 days to complete the check-in.

Discretionary overutilisation check-in

If the check-in is a discretionary overutilisation check-in, explain to the participant that during the check-in you'll discuss:

- how they're going with using the funding in their plan to access NDIS supports
- if their situation is impacting how they're using their funding
- ways to help the participant stay on track with spending within their plan budget.

Book a check-in meeting

If contacting by phone, before you call send an SMS to let the participant know you're going to call them from a private number within the hour.

To book a check-in:

1. From the **Person Account**, select **Cases**.
2. Select the **Check-in** case hyperlink in **Case Record Type**.
3. In the **Activity** panel on the right-hand side of the case, select **New Event**.
4. Fill out the event details.
5. Select **Save**.

If the participant doesn't attend the check-in meeting and you're unable to contact them, go to article Contact attempts and unable to contact in a check-in case.

Review or change a check-in meeting

To review or change a check-in:

1. From the **Person Account**, select **Cases**.
2. Select the **Check-in** case.

3. Select **Case Activity**.
4. Select **Open Activities**.
5. Select the **Check In meeting** hyperlink in **Subject** to review the details of the check-in.
6. To change the check-in, select **Edit** and update the details in **Edit Check In meeting**.
7. Select **Save**.

Make sure the participant still understands the purpose of the check-in, what they might like to do to prepare and what will happen after.

Reschedule a check-in

You may need to reschedule the check-in meeting to another date and time. For example, if:

- the participant can't make their scheduled check-in
- the participant's my NDIS contact can't attend the check-in
- you're unable to contact the participant or they can't complete the check-in when you contact them.

Where possible, reschedule the check-in so the new time works for the participant and the my NDIS contact. Generally this means the participant is supported by someone they're familiar with and who knows their situation. In limited situations, you can reassign the check-in case to another my NDIS contact if the participant wants to continue with the check-in.

If you're unable to schedule the check-in meeting before their plan reassessment, their current NDIS supports will continue for up to 12 months or until a new plan is finalised. Explain this to the participant and reassure them that this is so they can continue accessing their NDIS supports. Make sure the participant still understands the purpose of the check-in, what they need to do to prepare and what will happen after.

To reschedule a check-in:

1. From the **Person Account**, select **Cases**.
2. Select the **Check-in** case.
3. From the **Check-in** case, select **Check-in**.
4. At **Check-in Preparation**, confirm you've completed a desktop review using article Complete a desktop review before a check-in.

5. At **Based on your desktop assessment, does the participant require a check-in?**, select the relevant answer.
    - If **No**, select the reasons why the check-in won't go ahead. If you select **Other**, detail the reason in the **Detail other reason** free text field. For example, the participant is unable to proceed with the check-in at this time due to being in hospital. Select **Next**.
    - If **Yes but unable to contact**, select **Next**.
      Note: if your call attempts aren't successful, send an SMS to the participant to let them know and ask them to contact the NDIS. Go to article Send an SMS in PACE.
6. At **Next Steps**, select the **Check-in frequency**. This will default to 12 months. Use the drop-down to schedule the next check-in. The check-in frequency can be 1, 3, 6 or 12 months depending on the participant's situation.
7. The next check-in date will autofill. You can change this date using the **Calendar**. Confirm this date with the participant via email or SMS.
8. Select **Next**.
9. At **Check-in Summary**, select a **Closure Reason** from the relevant drop-down.
10. Record a **Closure Comment** in the free text field. For **Meeting not required**, a closure comment could include:
    - what you've communicated to the participant about their rescheduled check-in, impacts to their plan or any next steps
    - details of any authorised representatives
    - any actions taken
    - any updated court orders.
      Note: for **Unable to contact**, only close the check-in case after you've completed and recorded all required contact attempts. Once you've done this, select **Refresh**.
11. Select **Cancel Case**.

Note: staff will have full read-only access to the case once closed. The new **Check-in** date will show in the **Person Account** under the **My Profile** and **Plan** tabs.

Reassign a check-in

In limited situations, you can reassign the check-in case to another my NDIS contact if the participant wants to continue with the check-in and their current my NDIS contact isn't available.

Note: discuss this with your team leader before you continue with the check-in.

To reassign a check-in:

1. Update the **Person Account** with you as the participant's reassigned my NDIS contact. To learn more, go to article Update the my NDIS contact. This will be an ongoing change to the participant's my NDIS contact.
2. After you've completed the check-in, repeat step 1 to reassign back to their previous my NDIS contact.

Cancel a check-in meeting

To cancel a check-in:

1. From the Person Account, select **Cases**.
2. Select the **Check-in** case.
3. Select **Case Activity**.
4. Select **Open Activities**.
5. Select the drop-down arrow of the check-in meeting event.
6. Select **Delete**.

Next steps

To continue with the check-in, go to article Confirm the purpose and attendees during a check-in.

Article labels

PACE user role names

No change.

Topics

No change.

Case names

No change.

Ownership

No change.

Version control

Version	Amended by	Brief Description of Change	Status	Date
9.0	ED0024	Class 1 Approval. Added guidance for discretionary overutilisation check-ins	APPROVED	2024-10-21
10.0	POM825	Class 1 Approval Added guidance for reassessment check-ins and plan continuations	APPROVED	2025-02-27
11.0	POM825	Class 1 approval. Updated guidance to: • remove and replace transition streamlined planning articles • clarify what to expect at a plan transition check-in • understand that we don't offer the plan continuation pathway to participants with a plan moving from SAP CRM to PACE	APPROVED	2025-04-23

		• include new guidance on supporting participants in times of change		
12.0	AHB706	Class 1 approved Updated guidance to include link to resource How to create an anonymous Microsoft Teams Meeting when booking a check-in.	APPROVED	2025-06-06