

VALID NDIS Tip Sheet 2 - Top 10 Tips for Preparing for Your NDIS Plan Review

The following are some things you should think about in preparing for your Plan review. Where there are significant changes required or major gaps in NDIS funding, then we would suggest greater preparation is beneficial. You can collate your information yourself or use the [VALID Plan Review Preparation Chart](#).

1. Keep records (can just be in a diary) of any problems, issues and outcomes (good and bad) over the whole year if there are problems and for less time if things are going okay, but don't forget to report the successes.
2. Contact the planner (NDIA/LAC) at minimum 8 weeks from the end of the Plan if you have a lot of changes or the situation is complex; 6 weeks otherwise.
3. Make a list to give to the planner of what support has '*worked well*' and why.
4. Make a list to give to the planner of the supports and strategies that '*didn't work well*' and why, plus add what could be done to improve things.
5. Decide on what way you want to manage the funds for each of the type of support on your lists, i.e. Plan Managed, NDIA managed etc.
6. Develop your evidence before your NDIS Plan review e.g. records from point 1, letters, assessments etc.
7. Do your research, e.g. get quotes for things you need; find out recommended type and number of hours for assessments.
8. Review your Participant Statement (i.e. goals & profile) and make updates and/or change things to suit your situation and needs now.
9. Have all this information ready for the planner e.g. hard copy for meeting and/or upload it on to the Portal, as this usually speeds up the approval of your plan.
10. Decide on what support if any (e.g. Support Coordinator, Advocate, therapist, friend) will assist you at the meeting to make your case in the plan meeting, and/or feel confident to express your needs and discuss choices. Whoever you take, make sure that you discuss with them what role you want to take.