

The following are some things you should think about in preparing for your Plan review, especially when there are significant changes required or major gaps in NDIS funding. You can collate your information yourself or use the **VALID Plan Review Preparation Chart 1 and 2**

1. **Keep records** over the whole year of any problems, issues and outcomes, good and bad. You can create a diary and record any problems and remember 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; otherwise contact them 6 weeks prior.
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 **how you want to manage the funds** for each of the type of support on your lists, for example Plan Managed or NDIA managed etc.

6. Develop your **evidence** before your NDIS Plan review, like your records or a diary, letters and assessments.
7. Do your **research** - get quotes for things you need, find out recommended type and number of hours for assessments.
8. **Review** your Participant Statement (**goals and profile**) and make updates and/or change things to suit your situation and needs now.
9. **Have all this information ready** for the planner - hard copy for meeting and/or upload it onto the Portal, this usually speeds up the approval of your plan.
10. Decide on **what support will assist you at your planning meeting** (if any), like a Support Coordinator, Advocate, therapist or friend. They can assist you to make your case and/or feel more confident to express your needs and discuss your choices. **Make sure you discuss with your supporter what role you want them to take.**

