

Top 10 Tips for Preparing for your NDIS Plan Review

1. **Keep records** of any problems, issues and outcomes (positive or negative). Don't forget to **report the successes!**
2. **Contact the planner** (NDIA/LAC) at least 8 - 12 weeks before the end of the Plan, especially if you have a lot of changes or the situation is complex.
3. Make a list to give to the planner of **what support has 'worked well' and why**. You can use the Plan Review Preparation Chart template available from VALID (see page 2) to do this and point 4.
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 these things.
5. Decide on **which way you want to manage the funds** for each type of support. (i.e. Plan Managed, NDIA managed etc.) and add this to the chart.
6. Gather 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 and profile**) and make updates and/or change things to suit your current situation and needs.
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** you will need, if any, for the review meeting. (e.g. Support Coordinator, advocate, therapist, friend) to support your case in the plan meeting. **Whoever you chose to take, make sure that you discuss with them the role you want them to take.**

Note: Where there are significant changes required or major gaps in NDIS funding, greater preparation might be needed. Consider using the **VALID Plan Review Preparation Chart 1 and 2**.

VALID Plan Review Preparation Chart 1

What worked well that you want to keep in your NDIS plan?

Type in your info on the support or funding or equipment or program that has worked well whether it is NDIS funded or not. Then complete columns for EACH 'item'.

NOTE: A Word version of these charts is available from VALID, so you can type up your own charts.

VALID Plan Review Preparation Chart 2

What hasn't been working well that you need to add to or change in your next NDIS plan?

What? / Type of support	Quantity (e.g. Hrs)	Difficulties experienced with support or lack of support	Funds Management	What do you need in your NDIS plan?	Goal this supports

This Tip Sheet is one in a series of VALID NDIS Tip Sheets created by the VALID Family Team to assist participants/families manage NDIS funding and supports. Other Tip Sheets can be found on VALID website: www.valid.org.au

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