



## Preparing for your NDIS Plan review

*Helping you get the most out of your National Disability Insurance Scheme Plan Review Meeting*





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# What is an NDIS plan review?

*The Plan review is to see how you are progressing with your goals and make sure you are getting supports you need.*

*NDIS will review your Plan every 12 or 24 months, or earlier if there is a significant change in your circumstances and you have made a request for a review.*

## **What will happen at the NDIS Plan review Meeting?**

- The NDIS Planner will talk to you about your goals to see which goals have been achieved and where you still need support
- The Planner will talk to you about additional supports you may be requesting
- The Planner will review any reports or quotes to support your requests.
- The Planner then considers your requests and allocates your NDIS funds for the coming year. In some cases your next plan may be for 24 months.



## What can you do now?

- Check the end date of your Plan – start preparing as early as you can. We recommend that you start 3 months before your review to give you time to get the reports or quotes you may need to take to the meeting.
- Contact your Support Coordinator and request support to prepare for your Plan Review.
- Write down the goals that you have achieved and the supports you will be asking for in your next NDIS Plan.
- Request reports from your service providers about the outcomes you have achieved and the supports you may need in the coming year.
- Request quotes from current and potential service providers for the services you will need in the future.
- Get specialist reports for additional supports such as therapy support or equipment that you may need in the future.
- Read this guide and contact the person/s who will support you at the Plan review meeting.

## How is the Plan meeting organised?

- You will be contacted by the NDIS to set up a Plan Review meeting about 1 month before the end of your current Plan.
- You can request when and where you want to hold your Plan Review – at NDIS office, at your home, at your provider’s office.
- You can choose to bring a family member, friend, advocate, support coordinator, or carer if you want.

## Do you have any unspent funds?

Write down the reason why you still have unspent funds.

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It might be because there was a long waiting list to get the service e.g. Therapy assessment.

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It might be because you did not have a support coordinator to help you find the services you need

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It might be because you were not able to get staff support when you needed it.



# Checklist Of Useful Documents To Bring With You To Your Plan Review Meeting:

Documents	<input checked="" type="checkbox"/>
• Current NDIS Plan	
• Printout of funding spent and unspent ( <i>from NDIS Portal</i> )	
• Progress reports ( <i>your support coordinator will provide these</i> )	
• Assessment and medical reports ( <i>evidence/assessment reports are required if you are seeking further funds in your new Plan in order to achieve your goals</i> )	
• One to one individual and in-home support quotes ( <i>request from your 1:1 providers</i> )	
• Day support quote ( <i>request from your day service provider</i> )	
• Holiday quote ( <i>quote from a supported holiday provider</i> )	
• Workplace quote ( <i>request from your supported employment provider</i> )	
• Assistive technology reports/equipment quote	
• Cost to cover your incontinence products	
• Quotes from any other providers you wish to use	
• Carer's statement ( <i>if living at home parent can outline impact as evidence for short-term accommodation funding</i> )	
• Bank account details ( <i>so you can receive your mobility allowance directly into your bank account</i> )	
• 100 Points of I.D. if you are the Plan Nominee	



# Things to think about before your plan review meeting

## My current situation

### Have there been any changes for me in the last year?

- Do I need a new place to live?
- Have I moved house since my last plan?
- Who supports me now – family, friends, support workers, GP, Specialist services?
- Am I about to leave school?
- Have I started work?
- Am I about to retire?
- Do I need more assistance at home, at my day program or in the community?
- Do I need specialist assessments or support to maintain my positive relationships or mood?
- Do I need to specialist assessments, support or equipment eg:
  - my balance and walking
  - my communication
  - my vision or hearing
  - my personal care
  - my independence skills



## What do I do usually during the week?

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	Morning	Afternoon	Night
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Sunday			

## Review of my Goals

<b>What were my goals in my last Plan?</b>	<b>What were my outcomes?</b>
<b>Have my goals in my Plan changed? What are my new goals?</b>	<b>How will I achieve these goals?</b>

### Some ideas to consider:

- |   |  |
|---|--|
| <input type="checkbox"/> Social & community activities - What do I want to do during the day and on the weekends? | <input type="checkbox"/> What transport support do I need?                       |
| <input type="checkbox"/> Do I want to get an assessment to prepare for moving out of my family home?              | <input type="checkbox"/> Do I need communication support?                        |
| <input type="checkbox"/> Do I need home modifications?  | <input type="checkbox"/> Do I need support for my mental health?                 |
| <input type="checkbox"/> Do I want to do further education?   | <input type="checkbox"/> What equipment do I need?                               |
| <input type="checkbox"/> What help do I need to get ready for my day?   | <input type="checkbox"/> Do I need support to try new things or go on a holiday? |
| <input type="checkbox"/> Do I want support to get a job?  | <input type="checkbox"/> Do I need assistance with my health and fitness?        |
|   | <input type="checkbox"/> Do I need support in my relationships with others?      |

**Make sure you tell your NDIS Planner of what worked well in your previous Plan and what has not worked well.**



# Managing your NDIS funding

Do you want to change the way your Plan funds are managed?  
Yes/No

How are your NDIS funds managed now?

1. **Agency/NDIA managed** – you choose NDIS registered providers, you sign a service agreement and the provider claims payment directly from NDIS.
2. **Plan managed** – you engage a financial Plan Manager to keep track of funds and pay invoices for you. Your Plan Manager must be NDIS registered but the providers you use don't have to be NDIS registered.
3. **Self managed** – you are responsible for purchasing all supports in your Plan, record keeping, making payments to providers. Can use registered or unregistered providers. You provide records to any NDIS audit required of you.

**If your new Plan is not what you expected you can request an internal review within 3 months of the Plan meeting. If you are still not happy you can apply for a review by the Administrative Appeals Tribunal.**

## FINAL THOUGHTS. We recommend that you...

- Be prepared.
- Have a meeting with your Support Coordinator.
- Speak to other families.
- Gather all your documents.
- Take someone with you to the Plan Review meeting to help you articulate what you need going forward.

