



NDIS Plan Reviews

Please note this tip sheet was originally compiled for the Families as Planning Partners course.

VALID's Families as Planning Partners team have put together a collection of tip sheets to help you navigate the National Disability Insurance Scheme (NDIS). These tip sheets are practical guides designed for use where applicable to your individual situation.

VALID tip sheets should always be used in conjunction with **relevant guidelines** and are intended to help you get the most from your experience with the NDIS.

Note: Facts and information provided in these tip sheets were correct as possible as of March 2022, so it is advisable to check the relevant guidelines when making decisions to ensure that you have the latest information.

Having a **good NDIS plan** that meets the needs of a person is what we should aim for, in order to maximise supports and a person's potential to have a good life.

Being prepared is important and having the right people and good information for the meeting allows you to be clear and know what supports to ask for in the meeting.

We recommend that the person have a **Support Coordinator** where there is no family or independent nominee supporting the person. The Support Coordinator's role is to support participants and their supporters/family to manage their NDIS package, including writing a report for and gathering evidence/information ready to support the persons' Plan review.

Support staff and the support coordinator need to work together to ensure that the person receiving NDIS funded supports has evidence gathered for the plan review for if new things are needed or to change things.

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 1 template available from VALID <https://valid.org.au/resources-and-media/resources/ndis-tip-sheets/>

Tip Sheet

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. You can use the Plan Review Preparation Chart 2 template available from VALID
<https://valid.org.au/resources-and-media/resources/ndis-tip-sheets/>
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 tip 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, key worker, House Supervisor) 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**.

Resources

VALID Plan Review Preparation Chart 1, <https://valid.org.au/resources-and-media/resources/ndis-tip-sheets/>

VALID Plan Review Preparation Chart 2, <https://valid.org.au/resources-and-media/resources/ndis-tip-sheets/>

You can find VALID Tip sheets here:

<https://valid.org.au/resources-and-media/resources/ndis-tip-sheets/>



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