

# YOUR FREE GUIDE

## to the NDIS plan review

Please read this guide **before** your next review meeting to help you prepare for the future



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# About the NDIS Plan Review and why you should prepare now!

The Plan review is designed to see how you are progressing with your goals and make sure you are getting supports you need. This is where the NDIA will contact you sometime before your Plan finishes, assess your needs and allocate the appropriate funding for the next year or two.

## How does the Plan Review work now?

An NDIA planner, NDIA Service Officer or Local Area Coordinator (LAC) will make contact with you at any time during your current Plan period to discuss your wellbeing and ensure your NDIS supports are meeting your needs. This is called a **“Participant Check-In”**.

A participant check-in is a phone call from an NDIA representative where questions will be asked that focus on how your current NDIS plan is going, if your circumstances have changed since the last planning conversation and if your current goals are still relevant.

## This is your chance to have a say

A Participant Check-In can occur anytime even up to 6 months prior to the end of your current plan period. The call could come during the week or at the weekend and may only be 5 minutes long so we recommend that you prepare well in advance. You will need to know your NDIS budget and how it is being spent and what unspent funds are available and why.

On the occasion where your plan arrives in the post without a check-in call or where it is set to automatically renew, we suggest you contact your support coordinator or us if you don't have one to ensure the best outcome for your future.



# What to expect at your next NDIS Plan review check in?

The participant check-in conversation will determine which of the below review approaches will be applied:

- 1. SAME SUPPORTS - New NDIS plan with the same supports**
- 2. PLAN VARIATION - New NDIS plan with minor changes to current supports**
- 3. PLAN REASSESSMENT - A full plan review**

Any changes to the current plan will need to be tested against Reasonable and Necessary Criteria:

- Related to goals
- Supports social and economic participation
- Value for money
- Effective and beneficial
- Takes into account reasonable expectations of others
- Most appropriately funded by NDIS

**It is up to you to specify which of these three options you require.**

If you choose 2 or 3...

- The NDIS Planner should talk to you about which goals have been achieved over the past year and where you still need support and any additional supports you may require.
- The Planner should review any reports or quotes to support your requests.
- The Planner will then considers your requests and allocate your NDIS funds for the coming year or two



## What steps can you do now to prepare?



- **Check the end date of your Plan** – start preparing as early as you can. We recommend that you start 3 months before your current plan end date 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. If you do not have funding for Support Coordination, please contact us.
- **Read this guide** and complete the following exercises outlined in the next few pages. If you would like assistance, please contact us as soon as possible.
- **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.



# Things to think about before your plan review meeting

Do you have any unspent funds?  Yes  No

Is there any change in your circumstances?  Yes  No

Would you like to change how you manage your funding?  Yes  No

Could there be life changes to make over the next 3 years?  Yes  No

How connected you are with your social and community supports?

What questions do you have about how your plan is managed?

What worked well in your plan?

What didn't work as well?

What goals did you achieve?

What are your new goals for your next plan?

## Unspent funds

If you have unspent funds we advise that you write down the reasons why. It might be because you did not have a support coordinator to help you find the services you need, or there was a long waiting time to get the service you required, or you were not able to get staff support when you needed it.

## Life changes to consider

- Have I moved house since my last plan?
- Do I need a new place to live now or in the future?
- Who supports me now and who might I need in the future?
- Am I about to leave school?
- Have I started work or about to retire?
- Do I need more assistance at home, at day programs or in the community?
- Do I need specialist assessments, support or equipment to maintain or develop my positive relationships or confidence, balance and walking, communication, vision or hearing, personal care or independence skills?
- If your support needs are unlikely to change do you want to extend the plan?



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

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



# Daily Planner?



Using the table below, outline the support and activities you currently receive from your family, friends, carers and support providers to manage your daily activities, work towards achieving your goals, build independence, socialise, relax, keep fit and healthy and engage with the community.

DAY / TIME	MORNING	AFTERNOON	EVENING
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Sunday			

# Review of your goals

You can change your statement of goals and aspirations at any time, you just need to let the NDIA know. They should update your plan with your new statement of goals and aspirations and give you a copy of your varied plan within 7 days of getting your changed statement. The change results in a varied plan, rather than a new plan.

**Start by answering the following 3 questions.**

**1. What were my goals in my last plan?** Discuss with your service providers to ensure they are relevant and meaningful

**2. What were my outcomes?** Did I progress to wards achieving the goals and were the services and support appropriate?

**3. Should my goals in my Plan change?** If you answered no to 1 or 2 or were unclear, then we suggest you consider this. Please contact us for support to write relevant and meaningful NDIS goals.



**When reviewing goals, please consider:**

- What do I want to do during the day and on the weekends including social and community based activities?
- Do I want to do further education or skill development?
- What help do I need to get ready for my day?
- Do I want support to get a volunteer or paid job?
- What transport support do I need?
- Do I want to get an assessment to prepare for moving out of my home?
- Do I need home modifications?
- Do I need communication support?
- Do I need support for my mental health?
- What equipment do I need?
- Do I need support to try new things or go on a holiday?
- Do I need assistance with my health and fitness?
- Do I need support in my relationships with others?

# Managing your NDIS funding

Do you want to change the way your Plan funds are managed?

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 you are unsure about the pros and cons of each option above, please contact us to discuss.

What can you do if you are unhappy with your NDIS plan?

If your new Plan is not what you expected you can request an internal review within 3 months of the Plan meeting.

## Final recommendations

1. Complete this guide to be well prepared
2. Have a meeting with your Support Coordinator or contact us if you don't have one
3. Speak to other families
4. Gather all your documents

