

HOW TO PREPARE FOR A PLAN REVIEW MEETING WITH THE NDIS



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How to prepare for a review meeting with the NDIS

NDIS plans are reviewed regularly, however the timeframe can vary depending on your individual circumstances. The review process involves discussing your progress, setting goals, and possible adjustment being made to the support plan.

This review provides a great opportunity to ensure your plan still aligns with your goals and support needs.

When your NDIS plan is being reviewed there are several things you can do to fully prepare for the meeting. This will help you to avoid any delays in the approval of your new support plan.

1

REFLECTION



Thinking about your current plan can help you assess your needs for the future.

- What worked well in your plan?
- What didn't go so well with your plan?
- Have you made progress towards your goals?
- Are you happy with your current providers and the services they are offering?
- Consider if there have been any changes since the previous plan e.g. a new diagnosis or leaving school.

2

TALK TO US

Make an appointment to chat to your Interchange Illawarra Support Coordinator/Planner.

They will ask you about how you feel about your existing plan, if you have new goals for the future and if there have been any changes to your situation.

If you have an Interchange Illawarra Support Coordinator, they will help you create a list of any reports you may need to have updated. For example, you may need an updated Functional Assessment plan created by an Occupational Therapist. If you don't have a Support Coordinator, your Local Area Coordinator (LAC), should be able to assist you with these activities.

Your Support Coordinator can help you identify new goals and research service providers, suitable activities or appropriate supports.

Before your catch-up appointment have a think about any new goals you may want to achieve e.g. cooking independently or gaining supported employment.

Your Interchange Illawarra Planner can talk to you about how the support we provide can be structured to help you work towards your goals.



TIP

It is OK to have the same goals as you previously had, as long as your supports and services are helping you work towards the goals.

3

MAKE YOUR APPOINTMENTS OR REQUEST QUOTES



After you have talked to your Interchange Illawarra Support Coordinator about what reports will be required for your review meeting you will need to book in for them as soon as possible.

You may also need pricing quotations from Service Providers for any activities or programs you are interested in.

Your Support Coordinator or Support Worker may be able to assist you to make these appointments or get these quotations.



TIP

Sometimes it can take a while to get an appointment for a report so it's important to book in early. The NDIS recommends you start planning for your review meeting six months before your review date, if possible, to ensure you have enough time to get any required documentation.

4

PLAN PERIODS

It is now common to have longer plan durations if your situation is stable. You can request a plan duration of up to 5 years.



TIP

Talk to your Interchange Illawarra Support Coordinator to see if a longer plan is suitable for you.

5

PLAN MANAGEMENT

If you would like to change how all, or some of your plan funding is managed, then a plan review is the perfect time to discuss this.



6 THE REVIEW MEETING

What do you need to bring with you?

When you go to the planning review meeting you should bring:

- any letters you have received from the NDIA
- proof of your identity, like a driver's licence or passport
- your myGov login and password (if you manage your plan online)
- your bank account information (if you are self-managing your plan)
- a list of any aids or equipment you use
- any information or reports from your doctors or health care practitioners
- any quotes or summary reports from your service providers.



Who can come with you?

You can go to the planning conversation by yourself, or you can bring along support people like a family member or friend, an advocate or your Interchange Illawarra Support Coordinator.

All of the Interchange Illawarra Support Coordinators are very experienced in dealing with the NDIS system and plan reviews. They are a great resource and are happy to help guide you through the review process.

Other things to consider are how you will travel to the review meeting, if you need an interpreter, or any other supports.

Most plan review meetings are done over the telephone or via Zoom. You will need to organise a quiet place to take the call and ensure you have suitable Wi-Fi and access to a computer for a Zoom meeting.

If required, Interchange Illawarra have meeting rooms at our head office, The Wallis Centre, at 114 Church Street, Wollongong, which can be booked by your Support Coordinator or Support Planner.



TIP

It's a good idea to write down any questions you have so you can refer to it during the meeting.

Need more information?

For more in-depth information about preparing for a review meeting, we encourage you to visit the NDIS website <https://www.ndis.gov.au/> or call the NDIS on 1800 800 110.

The information provided in this fact sheet is general in nature. Please contact your Support Planner or Coordinator if you need further clarification. We are here to help!