

ThumbsUp top tips for preparing for your NDIS Plan Review.

Our ThumbsUp Support Coordinators have created their top tips for what you should be thinking about in preparing for your Plan review, especially when there are significant changes required or major gaps in NDIS funding.

1. **Keep records** over the whole year of any problems, issues and outcomes, good and bad. You can create a diary and record any problems and remember to report the successes.
2. **Contact the planner (NDIA/LAC)** at minimum 8 weeks from the end of the Plan if you have a lot of changes or the situation is complex; otherwise contact them 6 weeks prior – if they have a support coordinator they would be working with them and would not need to contact the NDIA/LAC.
3. Make a list to give to the NDIA planner of what **support has ‘worked well’ and why**.
4. Make a list to give to the NDIA planner of the **supports and strategies that ‘didn’t work well’ and why**, plus add what could be done to improve things.
5. Decide on how you want to **manage the funds** for each of the type of support on your lists, for example Plan Managed or NDIA managed etc.
6. Develop your **evidence** before your NDIS Plan review, like your records or a diary, letters and assessments.



7. Do your **research** - get quotes for things you need, find out recommended type and number of hours for assessments.
8. **Review** your Participant Statement (**goals and profile**) and make updates and/or change things to suit your situation and needs now.
9. **Have all this information ready for the NDIA planner** - hard copy for meeting and/or upload it onto the Portal, this usually speeds up the approval of your plan.
10. Decide on **what support will assist you** at your planning meeting (if any), like a Support Coordinator, Advocate, therapist or friend. They can assist you to make your case and/or feel more confident to express your needs and discuss your choices.

Make sure you discuss with your supporter what role you want them to take.

Our team is here to support you each step of the way through your NDIS journey.

If you have any questions,
don't hesitate to contact us!



ThumbsUp Plan Review Preparation List

What has not been working well in your Plan that you want to add or change in your next NDIS Plan?

Type of Support / Funding/ Equipment / Program	Quantity (eg. hours)	Difficulties experienced with support or lack of supports	Funds Management	What is needed in your NDIS Plan?

Scan to visit our website!



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