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# How to Prepare for Your NDIS Plan Review

## Get the Most Out of Your Next Review Meeting

Prepared by Your Story Community Supports

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Your NDIS plan review is your chance to update your goals, adjust your funding, and make sure your supports are working for you. A little preparation goes a long way.

This guide walks you through what to do before, during, and after your review — so you feel confident and in control.

## When Does a Plan Review Happen?

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- Most plans are reviewed every **12 months**
- You can also request an **unscheduled review** if your circumstances change significantly (e.g., a health change, moving house, a crisis)
- The NDIA will contact you to schedule the review — but you can also call them on **1800 800 110** to get the process started

## 4 Weeks Before Your Review

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### Reflect on Your Current Plan

- Look at your current goals — which ones have you made progress on?
- Which goals are no longer relevant or need updating?
- Are there new goals you want to add?
- Have your support needs changed? (More help needed? Less? Different type?)

### Gather Evidence

The NDIA makes decisions based on evidence. The stronger your evidence, the better your outcome.

- Reports from your providers** — ask your support workers, therapists, or support coordinator to write a brief report on your progress and ongoing needs
- Medical reports** — any new diagnoses, hospital admissions, or specialist letters
- Functional assessments** — OT or allied health assessments showing what you can and can't do
- Your own notes** — write down examples of how your disability affects your daily life
- Incident reports** — if there have been any crises or safety concerns, these support your case for more funding



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## Talk to Your Support Team

- Ask your support coordinator to help you prepare (if you have one)
- Ask your support workers what they've noticed about your progress and needs
- If you use therapy services, ask your therapist for a letter outlining recommended ongoing treatment

## 1 Week Before Your Review

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### Prepare Your Key Messages

Write down 3–5 key points you want to make. Keep them simple and specific.

#### Example:

- “I need more support hours because my health has declined and I now need help with showering every day instead of three times a week.”
- “I want to add a goal about community participation because I’ve been isolated and it’s affecting my mental health.”
- “My current SIL funding doesn’t cover overnight support, but I’ve had two incidents at night that required emergency help.”

### Organise Your Documents

- Print or save all reports and letters
- Bring your current NDIS plan
- Bring your goals worksheet (if you’ve completed one)
- Bring a list of your current providers and services

### Decide Who Will Attend

You can bring anyone to your review meeting:

- A family member or friend
- Your support coordinator
- An advocate (free advocacy services are available — ask us for a referral)

Having someone with you can help you feel more confident and make sure nothing is missed.

## During Your Review Meeting

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### Tips for the Conversation

- Start with your goals — what do you want to achieve in the next 12 months?



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- Be honest about what's hard — don't downplay your needs
  - Use specific examples: "Last Tuesday I fell in the bathroom because I didn't have support" is more powerful than "I sometimes need help"
  - Talk about what's working AND what's not
  - If you don't understand something, ask them to explain it differently
  - Take notes (or ask your support person to)

### What to Ask For

- Enough Core funding for the support hours you actually need
- Capacity Building funding for therapy, skill development, or employment support
- Capital funding for any equipment or home modifications
- Support coordination if you don't currently have it
- Plan management if you want more flexibility with providers

### If You Disagree

You don't have to accept a plan you're not happy with. You have the right to:

- Ask for a **review of a reviewable decision** within 3 months
- Contact an **NDIS advocate** for free support
- Request a new planning meeting

### After Your Review

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- Read your new plan carefully — check the funding amounts and categories
  - Contact your support coordinator to set up or adjust services
  - Let your providers know about any changes
  - Start tracking your progress toward new goals
  - Save this guide for next time

### Preparation Checklist — At a Glance

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Task	Done?
Review current goals and progress	<input type="checkbox"/>
Identify new goals	<input type="checkbox"/>
Gather provider reports	<input type="checkbox"/>



Task	Done?
Gather medical evidence	<input type="checkbox"/>
Write down key messages (3-5 points)	<input type="checkbox"/>
Organise documents	<input type="checkbox"/>
Decide who's attending with you	<input type="checkbox"/>
Prepare questions to ask	<input type="checkbox"/>

## Helpful Contacts

Who	Contact
NDIS	1800 800 110
NDIS Appeals	1800 800 110 (ask for Internal Review)
Disability Advocacy NSW	1300 365 085
Your Story Community Supports	<a href="http://www.yourstorycommunitysupports.com">www.yourstorycommunitysupports.com</a>

**Your story. Your way.**