



Bedford

# How to prepare for an NDIS Plan Review meeting

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When your NDIS Plan expires you will need to have a plan review meeting, this may be done over the phone or when circumstances allow in a face-to-face meeting.

The plan reviews are an opportunity to think about how your services and supports are working and how you are working towards achieving your plan and life goals.

Over time your goals will change, and your plan needs to change to reflect your new goals. Your plan review is important to make sure your new plan reflects all your needs.

**Our best advice is BE PREPARED!**

It is very important that you take time to prepare for the review.

Review what you did for your previous planning meeting and think about what you have achieved. Think about what you want to achieve in the future. The more you prepare the greater chance you have of getting a plan that will help work towards achieving your new goals.

You will be contacted by the NDIS or your Local Area Coordinator to schedule a plan review discussion.

You should also be aware that some NDIS participants are receiving a plan for 2 or 3 years, so it is important to think and talk about your short term and long term goals.

You should give thought to your short and long-term goals as you prepare for the planning meeting.

You should consider:

- How you have progressed with each goal in your current NDIS plan
- What you have achieved
- Do you have any new goals
- What you would like to do, including building on current skills and any new skills.
- Be mindful that if something hasn't quite worked out you may need more supports or funding to achieve these goals.
- How you want your plan budget to be managed (*this is who is going to pay your NDIS bills for you*).



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When you consider goals that are not yet achieved try to identify the reason.

It may have been because:

- You need more funding
- Family or cultural reluctance to help you working towards achieving your goals
- You were not able to connect with appropriate services providers.
- You had bad health.
- Couldn't arrange transport.

## **What should you take to your planning meeting?**

A copy of your current NDIS plan.

Notes on anything you have thought about which could include information from your service providers and what supports they have delivered or that you need to reach your goals in the future.

Quotes from people who currently provide services to you.

If you have someone who helps you make decisions it would be good to have them attend the meeting with you.

## **What happens if my plan ends before I have a new one?**

Sometimes your plan will end before you have a new one. Should this happen and there is a gap in your plans, you can continue with the services you are currently receiving if the provider will let you. When you have a new plan you will receive additional funding to cover the cost of the services provided during the gap period.

## **What do you do if things change?**

If your situation changes you should always speak to someone at Bedford and we can help guide you. Your Local Area Coordinator would be able to assist to arrange a plan review. This can be done by completing a Change of Circumstances Form.

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## **I need Help!**

**Please contact the Client Engagement team for assistance on 8275 0211 or email [clientmanagement@bedfordgroup.com.au](mailto:clientmanagement@bedfordgroup.com.au)**



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# A list of the most common things people say they wish they knew before they went into a Planning discussion.

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## **1. You can never be too prepared!**

We speak to lots of people and no one has ever said they were too prepared for their planning discussion.

The best outcome and new plan will be achieved if you plan well and before your planning discussion.

The more you know about the NDIS and how it works the better your chances of getting a plan you will be happy with.

It will help to refer to the planning documents you used for your previous plan. If you don't have a copy ask if your Local Area Coordinator can give you a copy before you scheduled discussion. This tool will assist you in preparing for your NDIS planning meeting, whether it is your first, second or third.

## **2. The Planner is going to ask you lots of questions**

To help build your new plan the Local Area Coordinator or Planner will need to ask you a lot of questions. The questions can feel never-ending, and maybe even a bit repetitive. This is totally normal and there is no need to be concerned. Take your time in answering the questions and if you don't understand, say so.

## **3. It's totally normal to write things down and bring prompts with you**

The NDIS planning meeting can be a pretty stressful time, and sometimes important points can slip our mind. By writing things down, you can be sure you won't forget anything on the day.

Here's a few things we recommend you take with you to your meeting:

- Your NDIS plan
- A list of questions you would like to ask your Planner thinking about:
  - Is what I want reasonable and necessary? The NDIS will only provide budget for things they agree are reasonable and necessary for you to achieve your goals.
  - Is it something that the NDIS covers? Or is it something that another system takes care of?
  - Is it in line with your goals? Goals are a big thing in NDIS-land, so it's important that the goal setting is done properly.
  - Does it take into consideration what is reasonable to expect of your family, carers, informal networks and community?



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## **4. Don't be uncomfortable to say how you really are!**

One of the biggest regrets that people have is not thinking about and planning for the bad days – talking about intimate details of your life to a stranger can be tough. But in the case of the NDIS, it is necessary. One of the most important things to remember going into your meeting is that the NDIS Planner or Local Area Coordinator does not know you. They will only know what you tell them. The more you tell them, the better they will understand your needs and goals, which will lead to the best outcomes for you.

At the end of the day, your Planner will be looking for insights into your life, what's working and what can be made better.

## **5. Some of it may sound a bit strange**

Lots of people say their NDIS planning discussion can feel a bit like another language. If you don't understand anything that is being said, ensure ask for it to be explained to you. It's your plan and you need to be involved and have understanding.

## **6. You can bring in whoever you want**

Having someone who knows you well in the meeting can make a world of difference. They will have likely been through many of these meetings and can help support before, during and after. This could be a family member, a friend or even a service provider who knows you well.

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**Contact us to find out how we can support you.**

**Enquire now  
Call us on 8275 0211.**