



Preparing for Plan Review Checklist

For some people, preparing for a plan review meeting can be very overwhelming. Preparation for a plan review meeting should begin about 6-8 weeks out from your plan expiry. Use this checklist to ensure you have all the information you need for your plan review meeting.

- Progress Reports** Ask your current providers to write a progress report on how things have gone in the past 12 months and any future needs you might have. If you have a Support Coordinator, they will do this for you.
- Assistive Technology** Do you use any equipment for mobility or accessibility? Do you need any equipment? Does /will your equipment need maintenance. Make a note of your current equipment needs.
- Daily/Weekly Schedule** What does your day and week look like? Note down your daily schedule from the time you wake up until the time you go to bed. This helps to tailor supports to your lifestyle.
- Review and update your Goals** Think about what you would like to achieve over the next 12 months. What support do you need to be able to achieve these goals?
- Current provider list** Note down all of your current service providers and their contact details. These can be updated with your Support Coordinator if you have one and the NDIS.
- How do you want your plan managed?** Would you like to self-manage your plan or would you like to have another provider such as a Plan Manager or NDIS look after the accounts/funding.
- Activities or Community Groups** What activities or community groups are you a part of? Do you go to Church, play Bingo, Volunteer?
- Mainstream/Informal supports** Have a list of the mainstream supports such as medical, educational or employment as well as informal supports such as your family, friends and neighbors.
- Sometimes Activities** Write down any occasional activities you do such as going on a holiday or activities you do at a certain time of year.
- List your continence products** Have an itemized list of all the continence and nutritional products you use during the course of the year and the total yearly cost (if possible).
- Questions** Have a list of any questions you would like to ask during the meeting.