

Getting ready for an NDIS plan review

What helps, what to gather, and what is easy to miss before review

You do not need to fill this out perfectly. You can use it as a checklist, a conversation guide, or a reminder of what to gather before your review. You can also ask someone you trust to go through it with you.

Plan reviews can be stressful because people often think they need to prove everything perfectly.

Most of the time, what helps most is being able to show what has changed, what is helping, what is not working, what is missing, and what daily life still requires.

Things that are easy to miss before review

1

Clear real-life examples

It helps to show not just that something is hard, but what happens when support is not there, inconsistent, or too hard to use.

2

An explanation for under-use

Using less support does not always mean less need. Sometimes support was too hard to organise, too hard to trust, unavailable, or too much to manage on top of everything else.

3

Current letters or reports

Old reports or general praise are usually not enough. It helps to have current examples of what support is needed, what is helping, and what support is still missing.

4

Support family or carers are quietly providing

A lot of support happens quietly. Reviews can miss how much prompting, transport, supervision, emotional containment, or admin family or carers are still carrying.

5

What is missing, not just what is failing

Sometimes the issue is not that a support went badly. Sometimes the right support was never properly there in the first place.

My review prep notes

Use short notes, dot points, or examples. You do not need full sentences.

This page is for getting the main points out of your head before the review. You can leave parts blank.

1 What has changed since my last plan?

2 What support is helping?

3 What is not working, missing, or hard to keep going?

4 What support has been hard to use?

5 What support are family, carers, or trusted people providing?
Examples: prompting, transport, planning, emotional support, crisis support, reminders, admin, supervision, checking in.

6 What would make daily life safer, easier, or more manageable?

Helpful things to gather before review

What to collect, who to ask, and what to check before review

1 Helpful things to gather

- ☐ notes about daily life
- ☐ examples of what has been hard to manage
- ☐ examples of what support has helped with
- ☐ current letters, reports, or support notes
- ☐ notes about risk, support breakdown, or increased pressure
- ☐ barriers to using funded support

2 Helpful prompts to send to providers or therapists

If someone is writing information for review, it helps if they focus on daily life impact, not vague praise.

Useful things for them to comment on

- ♥ what support is still needed
- ♥ what happens when support is not there
- ♥ what has changed since the last plan
- ♥ what is helping and why
- ♥ current gaps, barriers, or risks
- ♥ whether family or carers are carrying too much
- ♥ supports that were hard to use

Questions you can ask them

- ♥ What support is still needed?
- ♥ What has been difficult to manage?
- ♥ What support is helping, and how?
- ♥ What gaps, risks, or barriers are still present?
- ♥ Have funded supports been hard to access, organise, or use?

3 Before you finish

- ☐ Have I written down what has changed?
- ☐ Have I included what support is helping?
- ☐ Have I noted what is missing or hard to use?
- ☐ Have I included support family, carers, or trusted people are providing?
- ☐ Have I gathered any current letters, reports, or support notes?



A review should reflect what daily life is actually like.