

5 Tips For Preparing Your NDIS Plan Review

Unsure of how to prepare for your National Disability Insurance Scheme (NDIS) plan review? We've got you covered, with our top five tips to help you get plan ready.

1. What to expect

Your review can be completed over the phone or face-to-face, depending on your preference. If you choose face-to-face, you don't have to tackle the meeting alone. You can bring a family member, friend, advocate or another person with you to the plan review.

Be sure to have all your service provider assessments and reports for the year and any recommended future supports.

2. What worked & what didn't

Before your plan review, it can be a good idea to consider what worked and what didn't work in your plan over the past 12 months.

Questions to consider:

- What did your funding help you to achieve?
- Were you well-supported in your goals, living arrangements, and job?
- Was there an area where your funding fell short of the mark?
- Was there funding that you didn't end up using?

Each year's funding is based on the reasonable and necessary needs of each participant.

3. Your life now

The First2Care software platform can be a great tool for guiding you through questions you'll be asked by your Planner.

The 'My Life Now' section covers all the aspects that will come up for discussion, including:

- Activities
- Living arrangements
- Relationships
- Support available
- Aids and equipment

4. Future goals

After reviewing the past year, you might discover you've already achieved previous goals or your goals have changed. That's completely normal.

You might want to:

- Pursue a new hobby?
- Enter employment or change jobs?
- Change your living arrangements?
- Increase your independence?
- Improve your health and wellbeing?
- Widen your social circle?

5. Making life easier

Your planning meeting is an excellent opportunity to consider whether to change from being managed with the NDIA to appointing a Plan Manager. Your plan will need funding to make this change. A good Plan Managers (like First2Care) can give the peace of mind, flexibility and assurance that you receive the best Plan and support for your needs.



You have an NDIS plan, now what?

There are three options for managing your NDIS funding – plan managed, self-managed or agency managed.

A Plan Manager at First2Care will:

- Give you access to NDIS-registered or non-registered service providers;
- Receive and pay providers for their services;
- Keep track of your supports and funding budgets;
- Claim funds through the NDIS portal;
- Adhere to the NDIS Price Guide;
- Manage record keeping and financial reporting for your NDIS plan review and auditing;
- Help you choose providers (if needed); and
- Offer personalised one-to-one support, so you can spend more time achieving your goals and living the life you want.

Get your own personal bookkeeping team to manage your NDIS finances and paperwork, so you have more time doing the stuff you love.

We get to know you, so we can provide tailored, meaningful financial services to you. You spend less time on admin, and more time achieving your goals.

Need help understanding your plan? We're happy to work with you to help you understand your budget so you'll be crystal clear about what you can purchase and claim, and stay of financial track throughout your Plan.

Who is First2Care?



First2Care is an experienced NDIS Plan Management provider, registered Nationally.

We keep our clients informed at every stage of the process with real time updates of their budgeted expenses within the First2Care App.

Plan Management with First2Care

First2Care is an experienced NDIS Plan Management provider. With First2Care, NDIS participants will have access to a personal bookkeeping team and professional advisors who provide tailored, meaningful financial services at no extra cost to the participant. With First2Care managing your plan, you're free to achieve your goals and enjoy life. Visit our website, access our free First2Care software platform or speak to one of our Plan Managers today on 1300 322 273.



NDIS Plan Management Your Way

We'd love to be a part of your support team.