



# Planning



BOOKLET 2 OF 3



## BOOKLET

# 2

### This booklet covers:

- Understanding your current supports
- Creating an NDIS plan to achieve your goals
- Receiving an approved NDIS plan

# How to use this booklet

This booklet is a place for you to prepare for your new National Disability Insurance Scheme (NDIS) plan. This might be your first NDIS plan, or you may have had previous NDIS plans.

To get ready for your planning meeting, start thinking about your immediate support needs and what your current and future goals might be. This planning booklet will help you get ready to do that.

**NDIS KEY WORDS:** Some words we use to talk about the NDIS might be new to you, so we explain them along the way.

In this booklet, examples of notes or questions are shown in **red text**.

---

This is the second participant booklet in this series. Use this booklet in conjunction with Booklets 1 and 3.

## **BOOKLET 1: Understanding the NDIS**

### **Booklet 1 covers:**

- Learning about the NDIS
- Deciding whether to apply for the NDIS
- Accessing the NDIS

## **BOOKLET 2: Planning**

### **In Booklet 2:**

#### **Understanding your current supports and preparing for your planning meeting**

- To get ready for your meeting, think about your current supports and who provides them, and what supports and services you may need to achieve your goals.
- Complete this booklet on your own or with someone's help and bring it with you to your planning meeting. Consider any relevant reports or assessments you will need to bring with you as well.

#### **Attending a planning meeting to create your plan**

- Learn about what will happen in your planning meeting, who you will meet with, and who you can bring along with you.

#### **Receiving your approved NDIS plan**

- Learn how you will receive your NDIS plan, and what to do next.

## **BOOKLET 3: Using your NDIS plan**

### **Booklet 3 covers:**

- Understanding what's in your plan
- Learning how to use your plan
- Choosing and managing supports and services
- Reviewing your plan and progress

**You will receive the booklets you need during your NDIS journey, or you can access them on the NDIS website at [www.ndis.gov.au](http://www.ndis.gov.au)**

# Understanding your current supports

This section is for collecting general information about you, your disability and the current supports and services you receive. You can use this to start a conversation about you and your life when meeting with your ECEI Coordinator, LAC or National Disability Insurance Agency (NDIA) planner.

## Your personal details

Name:

NDIS number (found in your access letter):

Age:

What condition, disability/disabilities or developmental delay do you have? **E.g. I have cerebral palsy**

How does this impact your day-to-day life?

**E.g. I am mostly independent. I use a wheelchair to get around. I have a modified car. I need a bit of help with getting ready for work, meal preparation and house and garden maintenance.**

## Your current support networks

**Important people in your life:** These are people in your life who don't work for a disability service provider. They might be your friends, family, housemates, neighbours, your supervisor or workmates, advocates or others who care about you, help you and support you. They may also be people you support, like your children or parents.

Name	Relationship to you	Describe how they are involved in your life
E.g. Vito	Disability Liaison Officer at university	Helps me with special arrangements for lectures and exams.

**About you:** Tell us the things you think we need to know about you. What people or things are important to you? Where do you live? Who do you live with?

**E.g. I live with my girlfriend at my mum and dad's house. I'm really close to my family, and have a small group of friends I grew up with.**

**Daily life:** What do you do each day? What are your interests? Do you have a job?

**E.g. I go to a community centre three days a week. I don't have a job but volunteer at the local high school keeping the sports equipment organised. I'd like to have a full-time job one day.  
E.g. On the weekends, I spend time with my mates.**

## Your community and other government services

All Australians have a right to access government services.

The Australian, state and local governments fund services such as education, employment support, health and transport for all Australians. For more information about what the NDIS funds, and what is funded by other parts of government, refer to **Booklet 1 - Understanding the NDIS**.

This section will help your ECEI Coordinator, LAC or NDIA planner understand what support you receive from other parts of government and what community-based activities you are involved in, and what you might need in the future.

**Community:** Are there any sporting clubs, community groups or other organisations you are currently involved with? How often do you participate in activities in your community?

**E.g. I volunteer at my son's cricket club, mostly on weekends or for events. I'm a member of the local library, and sometimes attend events there with the kids.**

**E.g. I go to church with my wife a few times a week.**

**Other government services:** Do you receive any other government supports or services? These might include education (for example school, university, TAFE), transport and health (such as a regular GP you visit, or other health professionals). If so, how often do you go?

**E.g. I use public transport to get to work.**

**E.g. I have had the same GP for about 10 years, and she gave me a mental health treatment plan so I can get help with my anxiety. Sometimes I call the Mensline phone number if I need someone to talk to urgently.**

## What does your week usually look like?

**Weekly supports:** What community and other government supports do you use to help you do the things you need to each day?

Day	What I do	To do these things I get support from
E.g. Monday	<p>My son goes to childcare.</p> <p>Every Monday I have an appointment with my psychologist.</p>	<p>His childcare team have strategies in place in case he gets frustrated or upset.</p> <p>I got a referral from my GP.</p>
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

**Occasional activities:** What activities do you do fortnightly, monthly or every now and then?

E.g. I go to the swimming pool fortnightly with my sister, I go to social group on Thursdays, and the football on weekends with my uncle.

**Things that work well:** What do you enjoy about your life right now?

E.g. Our family just got a puppy, I really enjoy looking after him. I feel responsible for feeding, grooming and playing with him. I've never had a pet, so I'm learning how to care for him.

**Changes:** Is there anything you would like to change? Is there something new you would like to try?

E.g. I work two days a week in a reception centre. I would really like to find work in a café, where I can meet new people. I would also love to live in a share house with other people my age.



# Creating an NDIS plan to achieve your goals

During your planning meeting, you will discuss the goals you want to achieve as part of your NDIS plan. Generally, your first plan will last for 12 months. After your first plan, you may also be offered a longer plan, if your needs are less likely to change.

## Setting goals

**Goals** are an important part of the NDIS. In this section you'll start exploring goals for your NDIS plan. You will discuss them with your ECEI Coordinator, LAC or NDIA planner, who will ask you what you want to achieve and if you have short-term goals or any unmet needs in your current life that you think need to be addressed.

Your medium to long-term goals can be broken down into short-term goals that are 'small steps' towards your bigger life goals.

## Short-term goals

These goals can usually be achieved in under 12 months. Think about what you would like to achieve, why you would like to achieve it and when you would like to achieve it by.

What are your short-term goals for this NDIS plan?

## NDIS KEY WORDS:

### Goals

Goals are things you want to achieve with support from the NDIS and other supports and services. Your goals might include becoming more independent, getting or keeping a job, learning new skills, enrolling in education, becoming more active in your community, or improving relationships and making friends. You should try to make your goals as specific as possible.

**E.g. Goal 1: This year, I want to learn to use public transport by myself so I can go to the library, start a course or go out with friends and not rely on my mum.**

**E.g. Goal 2: I want to be able to shower myself, without a support worker.**



## Medium to long-term goals

What do you want to achieve in the medium to long-term? These goals may take a number of years to achieve but it's important to identify the steps towards achieving them.

**E.g. Goal 1: In the next few years, I want to move out of home, maybe with a friend.**

**E.g. Goal 2: Get a job so that I can pay my own bills.**

## Getting ready to access the myplace portal

Once your NDIS plan has been approved, you will be able to view it online at the NDIS **myplace** portal. You need to have a myGov account to do this.

To create your myGov account, go to the website [www.my.gov.au](http://www.my.gov.au)

If you have trouble, need help to create your myGov account or want to know more about the NDIS myplace portal, contact your ECEI Coordinator, LAC or the NDIA.

You can also call the myGov helpdesk on **13 23 07**.

### NDIS KEY WORDS:

#### **myplace**

myplace is a secure website for participants or their nominee to view their NDIS plan, request payments and manage services with providers.



## Managing your NDIS funding

Your NDIS plan will have funding in one or more budget categories for you to pay for supports and services. You can decide what services you receive, who provides them and when.

Your ECEI Coordinator, LAC or NDIA planner will ask you how you would like to manage your NDIS funding and help you choose the best way to manage your funds for your needs and circumstances.

There are three options to manage your NDIS funding – self-managed, plan-managed and NDIA-managed. You can also use a combination of options. For example, you might choose to self-manage one part of your plan to start with and have the rest managed by the NDIA.

### Self-managed

Self-managing your funds gives you maximum independence and flexibility managing your support. You have control over, and responsibility for, your NDIS funding.

If you self-manage, you are responsible for purchasing supports within your budget that will best help you achieve the goals you have identified in your plan.

#### If you self-manage, you can:

- Be innovative and flexible in deciding who provides the supports in your plan – they can be an **NDIS registered provider** or an unregistered provider.
- Employ your own staff or pay someone else to employ them on your behalf. (In most cases, family members cannot be employed to provide support to you).
- Purchase more supports using any savings you make by arranging your services, provided they are in line with what is agreed in your plan.

There are additional requirements and responsibilities for people who self-manage their funds, including record keeping, acquittals and payment of provider invoices. Learn more in the **NDIS Guide to Self-Management**, available on the NDIS website.

### Plan-managed

If you choose to use a Plan Manager, they will pay your providers for the supports you purchase, help you keep track of your funds and do any financial reporting for you. You can do the same things as if you were self-managing except a Plan Manager pays the bills for you. Depending on your circumstances, a Plan Manager can also help you choose your providers. A Plan Manager is funded in your plan.

Your Plan Manager must be an NDIS registered provider and they will claim directly from the budgets in your plan to pay your providers on your behalf.

#### NDIS KEY WORDS:

##### NDIS registered provider

Providers that are registered are called NDIS registered providers and meet government quality and safety standards. Organisations or individuals can apply to be a registered provider. You can search for registered providers on the NDIS website or myplace portal.

“

“From the start we have been self-managing and it gives us full control of the supports Frank receives. It requires more work to coordinate and manage but we know how every dollar is being spent and we make all the decisions regarding Frank’s needs and supports.”

**MEGAN, FRANK’S MUM**



## NDIA-managed

When your plan is managed by the NDIA (sometimes referred to as Agency-managed), you are able to choose from a range of NDIS registered providers. Your providers claim payment electronically from your funding. You cannot use unregistered providers. You can look on the myplace portal to see what claims providers are making against your NDIS funding and keep track of your budget.

“

“I’m not stressing like I used to; the NDIS has taken a load off my shoulders.”

STEPHANIE, SANDY’S SISTER



The table below outlines the differences between the plan management options:

I can...	Self-managed	Plan-managed	NDIA-managed
Have choice and control over the providers I use	✓	✓	✓
Use NDIS registered providers	✓	✓	✓
Use non-registered providers	✓	✓ (Although your plan manager must be a registered provider)	You must use registered providers when your plan is NDIA-managed.
Negotiate pricing to pay less than the NDIS price guide	✓	✓	✓
Pay more than the NDIS price guide	✓	Providers delivering supports to a participant using a Plan Manager cannot charge more than the NDIS price guide.	Providers delivering supports to a participant whose plan is managed by the NDIA cannot charge more than the NDIS price guide.
Make value-for-money decisions in line with my plan	✓	✓	✓
View my plan on the myplace portal to keep track of my budget	✓	✓	✓
Manage book-keeping and records of my spending	✓	Your Plan Manager will do this for you.	The NDIA will do this for you.

For more information about plan management options and what might work best for you, speak to your ECEI Coordinator, LAC or NDIA planner.

## Other important information

Are there any other areas of your life that you need to discuss? Are there supports you are currently receiving that you would like to continue, do you have any safety concerns or other questions you'd like to ask?

## Checklist

### Have you done everything you need to do?

- Filled out this booklet
- Noted any questions you'd like to ask
- Decided who you would like to come to your planning meeting with you
- Gathered any other information or reports you think would be helpful for the NDIS to understand the impact of your disability and your personal circumstances

**If you've completed all of the above, you are now ready for your planning meeting.**

**Your ECEI Coordinator, LAC or NDIA planner will contact you to arrange a time that suits you to have this meeting. You can record your meeting details on the next page.**

## Your planning meeting

<b>Date:</b>
<b>Time:</b>
<b>Location:</b>
<b>Who you will bring:</b>

## What should you bring to your planning meeting?

If possible, please bring:

- This booklet
- Your bank account details (if you are considering self-managing all or a portion of your NDIS funding)
- Your myGov login and password details (if you need help with this, talk to your ECEI Coordinator, LAC or NDIA planner).

You can also bring along a family member, friend, advocate or anyone else to your meeting. If you want help to arrange an advocate to attend with you, contact your ECEI Coordinator, LAC or NDIA planner.

## Your questions

Question	Answer

# Receiving an approved NDIS plan

While you may work with an ECEI Coordinator or LAC to develop your NDIS plan, all participant plans must be approved by the NDIA. After it is approved, you will receive your plan either in person or in the mail, and through the myplace portal.

Your ECEI Coordinator, LAC or NDIA planner will let you know the next steps and how long it will take to receive your approved plan.

During your planning conversation you can request a copy of your plan printed in a variety of accessible formats such as Braille, electronic text (on CD), large print or audio (on CD), or translated into your preferred language.

## What happens if you disagree with what's in your plan?

You have the right to ask for an **internal review** of your plan by the NDIA. Your ECEI Coordinator, LAC or NDIA planner will explain how to do this and can put you in touch with advocates who can help you with this process.

A request for an internal review of a decision must be made within three months of receiving notice of the decision from the NDIA.

If you're not happy with the internal review, you can apply for a review by the Administrative Appeals Tribunal (AAT), which exists outside the NDIA. You can't ask the AAT to review a decision by the NDIA before there has been an internal review by the NDIA.

### NDIS KEY WORDS:

#### Internal review

This is a review of a decision by the NDIA.

The NDIA staff member who works on the internal review will not have been involved in the earlier decision.

They may want to talk to you directly as part of this process.

“

“Once Sam became a participant with the NDIS, we started exploring options and he ended up getting the app, Proloquo2Go. It can allow him to communicate about his interests and things that he likes. The ultimate goal for Sam is to have paid employment, and he's expressed an interest in that.”

**PETER, SAM'S SPEECH PATHOLOGIST**



## Your ECEI Coordinator, LAC or NDIA planner's contact details

Name:

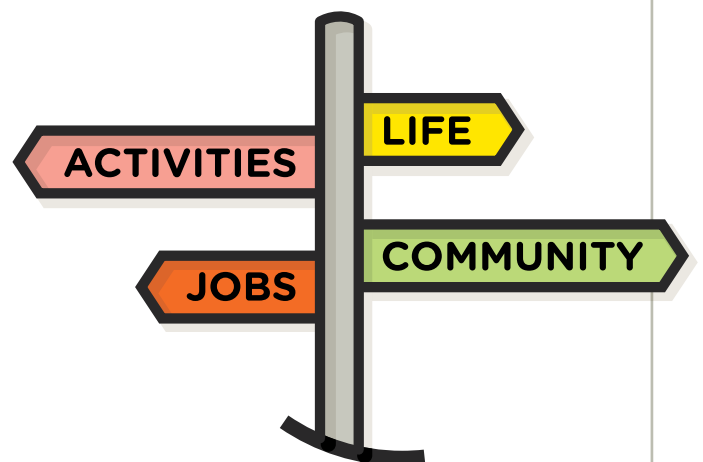
Phone number:

Email address:

Office address or location:

## Actions, notes and ideas

Use this section to list down any actions, notes or ideas you take away from your planning meeting. This might include a list of community or other government services to be contacted, service agreements to be made with providers, peer support groups that meet in your area or online, next steps or any other useful information from your planning meeting.



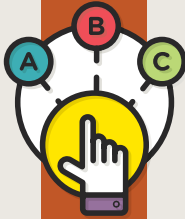


## What happens next?



### **You have an approved NDIS plan.**

- When you have an approved NDIS plan, you will need to understand the different budgets, who can help you start using your plan and how your plan is managed.



### **Start using supports and services that will help you achieve your goals.**

- Once you understand your plan, the next step is to start working towards achieving your goals.
- You will be supported to get your plan started. Your ECEI Coordinator, LAC or the NDIA can help you choose the right providers and help you if things aren't working out.
- Your ECEI Coordinator, LAC or NDIA planner can help you to connect with community and other government services and peer support groups.



### **Towards the end of your plan, your ECEI Coordinator, LAC or NDIA planner will work with you to review your plan and outcomes, and create a new NDIS plan.**

- This is an opportunity to reflect on your plan and celebrate your achievements! For most people, this will happen after 12 months.

You are now ready to move to:

**Booklet 3: Using your NDIS plan**

**For more information about this booklet, please contact:**

**[www.ndis.gov.au](http://www.ndis.gov.au)**


**National Disability Insurance Agency**

 Telephone 1800 800 110

 Find us on Facebook/NDISAus

 Follow us on Twitter @NDIS

**For people who need help with English**

 TIS: 131 450

**For people with hearing or speech loss**

 TTY: 1800 555 677

 Speak and Listen: 1800 555 727

 Internet relay: National Relay Service  
[www.relayservice.gov.au](http://www.relayservice.gov.au)