



# Planning

1

2

3

Booklet 2 of 3



## Booklet

# 2

### This booklet covers:

- getting ready for your planning meeting
- creating an NDIS plan to achieve your goals
- receiving your approved NDIS plan.



# Please note: **COVID-19**

## **The NDIA has made some changes to the way we do things during the COVID-19 pandemic.**

Some of the things in this booklet might be slightly different to how you might experience your NDIS journey now.

Some of the changes we have made include:

- You can get the access request form, and supportive evidence form online- so you do not have to go to your local NDIS office to apply.
- Your meetings with your Local Area Coordinator, Early Childhood Early Intervention Coordinator or the NDIA be held over the phone where possible. This includes planning and plan review meetings.
- The NDIA will contact you by phone to undertake your plan review and will discuss the option of having your plan in place for 24 months.
- You don't need to do anything if your plan is going to expire, it will be automatically extended for 12 months if we haven't been able to complete a plan review.
- Your plan is now more flexible. We have broadened our approach for low cost AT items and there's new line items added for supported independent living.

# How to use this booklet

This booklet will help you to prepare for a National Disability Insurance Scheme (NDIS) plan that is tailored to your individual needs and goals.

If you have been granted access to the NDIS, you will be contacted to arrange a planning meeting. This might be your first NDIS plan, or you may have had previous NDIS plans. You can also request a pre-planning meeting with your Early Childhood Early Intervention (ECEI) Coordinator, Local Area Coordinator (LAC) or National Disability Insurance Agency (NDIA) Planner to check you have all the information you need for your planning meeting. If you don't know what an ECEI Coordinator, LAC or NDIA Planner are, you can read about them in **Booklet 1 Understanding the NDIS**.

To get ready for this meeting, start thinking about what your goals for the future might be and what support you might need to help you reach them. You can read more about goals on page 12.

Work through this booklet and fill in your responses to the questions, ready to take to the meeting. You can fill it in on your own or with someone's help. If you have someone who acts on your behalf, such as a nominee or third party decision maker, they can fill out this booklet for you.

**NDIS key words:** Some words we use to talk about the NDIS might be new to you, so we explain them along the way. These words are in **purple** text.

**Examples:** In this book examples are written in **red** text and start with the words 'For example'.

---

This is the second booklet in this series. Use this booklet together with Booklets 1 and 3. We recommend you keep the three booklets together for easy reference.

## Booklet 1: Understanding the NDIS

- Understanding the NDIS
- Applying for the NDIS
- Supports and services funded by the NDIS

## Booklet 2: Planning

### Getting ready for your planning meeting

- What to think about and prepare before your planning meeting

### Creating an NDIS plan to achieve your goals

- What will happen in your planning meeting and who you can bring along with you
- Setting goals
- Ways to manage your NDIS funding
- What to bring to the meeting

### Receiving your approved NDIS plan

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

## Booklet 3: Using your NDIS plan

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

These booklets are available in different formats and in other languages. Visit [ndis.gov.au](http://ndis.gov.au) or call **1800 800 110** to request a copy.



# Getting ready for your planning meeting

This section is for collecting general information about you, how your life might be impacted by your disability and the current supports and services you receive.

These details can be used to start a conversation about your life when meeting with your ECEI Coordinator, LAC or NDIA Planner.

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

**Name:**

**Phone number:**

**Email address:**

**Office address:**

## Your personal details

### About you

**Name:**

**NDIS participant number (found in your access letter):**

**Date of birth:**

**What condition, disability/disabilities or developmental delay do you have?**

**For example, I have cerebral palsy.**

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

**For example, 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.**

Tell us a little about you. What people or things are important to you? Where do you live? Who do you live with?

**For example, 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? Are there any aids or equipment (assistive technology) that you use to do what you want each day?

**For example, 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.**

**On the weekend I spend time with my mates.**

**I use an AAC (Augmentative and Alternative Communication) app on my iPad, which speaks as I press the buttons. It helps me tell my family and friends what I am thinking.**

## Your current support networks

### Important people in your life

Tell us about the important people in your life and the community who are already supporting you. These are people who don't work for a disability service provider. They might be your friends, family, housemates, neighbours, 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	Tell us how they are involved in your life
For example, Maria and David	Mum and Dad	See me regularly at family dinners and celebrations. They also volunteer with me at community fundraising events.
For example, Vito	Disability Liaison Officer at university	Helps me with special arrangements for lectures and exams.

## Your community, other government services and compensation

All Australians have a right to access government services.

The Australian, state, territory and local governments are responsible for services such as education, employment support, health and transport. For more information about supports and services funded by the NDIS, 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
- what community-based activities you are involved in
- 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? How do you get to your activities?

**For example, 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. I take public transport. I go to church with my wife a few times a week. My wife usually drives.**

## Other government services

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

**For example, I use public transport to get to work.**

**I have had the same doctor for about 10 years. 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.**

**I have been receiving oxygen supports from my health service.**

## Compensation

Is your disability the result of an accident or injury? Have you received compensation? Do you have a compensation claim in progress or are you yet to claim compensation? Are you receiving supports from a personal injury compensation claim, either through a government agency or from an insurer?

**For example, I was injured after tripping on a curb. I received a compensation payment for my injury. I receive ongoing support from the hospital insurer after an injury during surgery.**



## Weekly supports

What community and other government supports do you use to help you do the things you need to each week?

Day	What I do	To do these things I get support from
<p><b>For example, Monday</b></p>	<p><b>My son goes to childcare.</b></p> <p><b>Every Monday I have an appointment with my psychologist.</b></p> <p><b>I go to work.</b></p>	<p><b>His childcare team have strategies in place in case he gets frustrated or upset.</b></p> <p><b>I got a referral from my GP.</b></p> <p><b>I use my modified car and wheelchair to get there.</b></p>
<p><b>Monday</b></p>		
<p><b>Tuesday</b></p>		
<p><b>Wednesday</b></p>		
<p><b>Thursday</b></p>		
<p><b>Friday</b></p>		
<p><b>Saturday</b></p>		
<p><b>Sunday</b></p>		

## Occasional activities

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

**For example, 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.**

**I sometimes have to go interstate for a meeting. I have to take a portable shower chair and organise a carer to come with me.**

## Assistive technology

Are there any aids or equipment (assistive technology) you use to do what you want each day?

Assistive technology may be equipment or systems which help you with moving around your home or community, communicating with other people, processing information and other daily tasks.

**For example, I use a wheelchair, modified cutlery and a communication device.**

## Other important information

### Things that work well

What do you enjoy about your life right now?

**For example, our family just got a puppy. I really enjoy looking after and playing with him. I am responsible for feeding and grooming our puppy. I've never had a pet, so I'm learning how to care for him.**

**I like to watch movies and visit my grandparents.**

### Changes

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

**For example, 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.**

**I'd like to get an accessible shower so I can shower without help.**

## Other areas to discuss

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?

**For example, my wheelchair is wearing out and will need to be repaired soon.**

## Your questions

Question	Answer

# Creating an NDIS plan to achieve your goals

Your ECEI Coordinator, LAC or NDIA Planner will contact you to arrange a time that suits you to have your planning meeting.

This meeting can take place in person or over the phone—whichever you prefer.

During your planning meeting, you will discuss what you would like to continue doing and may want to do in the future. These will be your **goals**. The goals you share will help us build a personalised plan for you.

A plan will usually be up to 24 months, depending on how likely your needs are to change.

## Your planning meeting

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

### NDIS key words:

#### Goals

Goals are things you aim to achieve with help 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.

## 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. They will ask you what you want to achieve and if you have goals or any unmet needs in your current life relating to your disability that you think need to be addressed.

Life goals take longer to achieve and can be broken down into short-term goals.

The goals within your plan should be SMART (specific, measurable, achievable, realistic and timely). Being specific and measurable will give you a clear target to work toward and allow you to easily see when your goals have been achieved. If goals are not recorded as SMART it is difficult to measure your progress and what you have achieved.

You may be asked to record your current abilities against the goal so you can measure your progress over time.

## Short-term goals

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

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

**For example:**

- **Goal 1: This year, I want to learn to use public transport by myself, so I can go to the library or out with friends and not rely on my Mum.**
- **Goal 2: Within the next four months, 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.

### For example:

- **Goal 1: In the next few years, I want to move out of home, maybe with a friend.**
- **Goal 2: By next Christmas, I'd like to get a job so that I can pay my own bills.**

## Managing your NDIS funding

As part of your planning meeting your ECEI Coordinator, LAC or NDIA Planner will ask how you would like to manage your NDIS funding. They will help you choose the best way to manage your funds for your needs and circumstances.

Your NDIS plan will have funding in one or more budget categories for you to pay for supports and services. You, or your representative, can decide what services you receive, who provides them and when—provided they are related to your disability and will help you achieve the goals in your plan.

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 or more of your supports to start with and have the rest managed by the NDIA.

### Self-managed

Self-managing your funds gives you maximum independence and flexibility in 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. Purchases must be in line with the intent of your funding and help you achieve the goals you have identified in your plan.

If you self-manage, you can:

- Decide 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. 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. A number of obligations and responsibilities also apply to participants choosing to employ their own staff.

Learn more in the Guide to Self-Management, available on the NDIS website [ndis.gov.au](https://www.ndis.gov.au) or ask your ECEI Coordinator, LAC or NDIA Planner for a copy.

### Plan-managed

If you choose to use a Plan Manager, they will be funded in your plan. 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 and the type of support in your plan, a Plan Manager can also help you to find providers.

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.

“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**



### NDIS key word:

#### NDIS registered provider

Providers that are registered with the NDIS Commission are called NDIS registered providers and meet the independent NDIS Commission’s quality and safety standards.

Organisations or individuals can apply to be a registered provider. You can search for registered providers at [ndis.gov.au](https://www.ndis.gov.au) or myplace portal.



## 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.

## NDIS key word:

### Myplace portal

The myplace portal is a secure website for participants or their nominee or third party decision maker to view their NDIS plan, request payments and manage services with providers.

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)	No. 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	✓	No. Providers delivering supports to a participant using a Plan Manager cannot charge more than the NDIS price guide.	No. 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	✓	No. Your Plan Manager will do this for you.	No. 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.

## What to bring to your planning meeting

You can come to the planning meeting by yourself or bring along a family member, friend, advocate or anyone else.

If you want help to arrange an advocate to attend with you, contact your ECEI Coordinator, LAC or NDIA Planner.

If possible, please bring to the meeting:

- This booklet with as much information filled in as you can.
- Proof of your identity, for example, a passport and driver's licence. You can find the [Proof of Identity](#) fact sheet on the NDIS website [ndis.gov.au](http://ndis.gov.au) for more information.
- Your bank account details, if you are considering self-managing all, or a portion of your NDIS funding.
- If you are bringing along someone who you have given consent to act on your behalf, they will also need to supply proof of identity. If you bring along someone who works for an organisation that represents you they will be asked to verify the details of the organisation. A person from an organisation that represents you could be a Public Guardian, a disability advocate or a legal representative.
- Any other information or reports completed by health professionals or service providers you think would be helpful for the NDIS to understand the impact of your disability, and your personal circumstances.
- A list of any assistive technology that you use, for example, a wheelchair, modified cutlery or communication device.
- Your myGov login and password details (if you need help with this, talk to your ECEI Coordinator, LAC or NDIA Planner) so you can log on and we can show you how to use the NDIS myplace portal.

“Once Sam became a participant with the NDIS, we started exploring options and he ended up getting the app, Proloquo2Go. It allows 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**



# Receiving an approved NDIS plan

## Once your plan is approved

While you may work with an ECEI Coordinator or LAC to develop your NDIS plan, all 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 in a variety of accessible formats, such as braille, electronic text (on CD), large print, audio (on CD)—or translated into your preferred language.

## Getting ready to access the myplace portal

Once your NDIS plan has been approved, you will be able to view it online on the NDIS myplace portal. You need to have a myGov account to do this. To create your myGov account, go to the website [my.gov.au](https://my.gov.au)

If you 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**.



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

If you disagree or are unhappy with the goals in your plan, you can ask for these to be changed at any time. Your ECEI Coordinator, LAC or NDIA Planner will help you with submitting this and having it changed.

If you disagree with the supports funded 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, if required, who can help you with this process. Or visit [ndis.gov.au](https://ndis.gov.au) for more information on requesting an internal review of your plan.

A request for an internal review of your plan must be made within three months of receiving the plan.

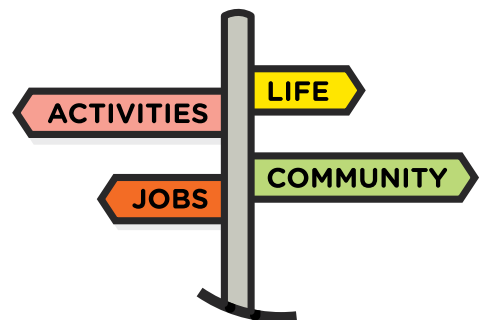
If you're unhappy with the internal review, you can apply for an external review by the Administrative Appeals Tribunal (AAT).

You can't apply to the AAT before there has been an internal review by the NDIA.

## Actions, notes and ideas

Use this section to list any actions, notes and ideas you take away from your planning meeting.

This might include a list of community or other government services to be contacted, 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.



**1****2****3**

## What happens next?



- Once you understand your plan, the next step is to start using supports and services and work towards reaching 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 also help you if things aren't working out.



- Your ECEI Coordinator or LAC can help you find community and other government services and peer support groups. Depending on your needs, your NDIA Planner may also include funding for a support coordinator who can help you to connect with these services.


- 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.



You are now ready to move to  
**Booklet 3: Using your NDIS plan**

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

### National Disability Insurance Agency


 Telephone 1800 800 110

 Find us on Facebook/NDISAus

 Follow us on Twitter @NDIS

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

### For people who need help with English

 TIS: 131 450

### For people who are Deaf or hard of hearing

 TTY: 1800 555 677

 Speak and Listen: 1800 555 727

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