

Creating your NDIS plan

Booklet 2 of 3



This booklet covers:

- getting ready for your planning conversation
- creating your NDIS plan
- receiving your approved NDIS plan.

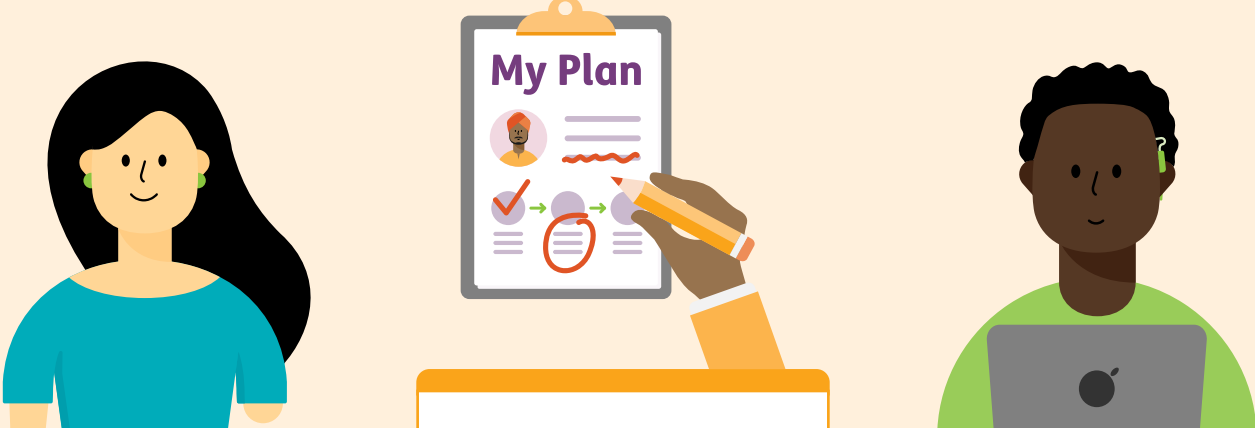
How to use this booklet

Welcome to the planning phase of your NDIS experience.

This booklet will help you understand how we create your NDIS plan, and how it is tailored to your personal needs and goals.

You can share the booklet with family and friends and bring it to meetings.

This is the **second of three** booklets in the series.



The illustration shows a woman with long black hair and a blue top on the left. In the center, a clipboard titled 'My Plan' is held by a hand, with a pencil pointing to a red circle around a task. On the right, a man with short black hair and a green shirt is sitting at a laptop.

Booklet 1
Applying for the NDIS

- What the NDIS does and who is involved
- Whether you may be eligible to join
- How to apply to join NDIS
- The types of things the NDIS funds

Booklet 2
Creating your NDIS Plan

- Getting ready for your planning conversation
- Creating your NDIS plan
- Receiving your approved NDIS plan

Booklet 3
Using your NDIS plan

- What your plan includes
- How to use your plan
- How to choose and pay for supports and services
- How to prepare for your plan reassessment



These booklets are available in different formats and languages other than English. Visit the [NDIS website](#) or call **1800 800 110** to request a copy.

How we create your plan

Once you [become a NDIS participant](#), we go through the planning process together.

When we create your plan, we:

- set up a planning conversation, so we can get to know you and discuss your situation
- consider what community and other government services can provide to you to help you pursue your goals and live as independently as possible
- consider if you need any NDIS funded supports, and if they meet the [NDIS funding criteria](#)
- ask for further information about your support needs if we need to
- develop and approve your plan
- send your plan to you.

You can ask other people to help you if you want to. For example, you can have friends, family or an advocate join the planning conversation. They can also help you to make your own decisions about your plan if you want them to.

Before your planning conversation

Before your planning conversation, we review:

- the information in your NDIS Application Form
- any reports from your doctors or allied health professionals
- other assessments you give us, for example from other government agencies or disability service providers
- other relevant information we have about your support needs
- any other information you give us.

This helps us get to know you better and learn about your situation. It also helps us check where we might need more information about you to help us create your plan.

Your early childhood partner, local area coordinator or NDIA planner will contact you to arrange a time that suits you to have your planning conversation.

We'll ask how you want to have your planning conversation, for example where and when we meet with you, or if you would prefer to do it over the phone.



You can record your **early childhood partner, local area coordinator, support coordinator or recovery coach's** contact details here:

Name:

Phone number:

Email address:

Office address:

Getting ready for your planning conversation

What we will talk about in your planning conversation

We'll talk to you about your daily life, and what you'd like to do in the future. We'll also talk about how the NDIS can help you do what you want to do.



We'll ask you about things like:

- your goals
- where you live, and your living arrangements
- how you move around your home and your community
- who supports you now, such as your family, friends or service providers
- support available to you from the community and other government services to help you learn new skills and become more independent
- what self-care support you need
- if you use or need equipment, technology or devices, also known as assistive technology
- what social and recreation activities you'd like to do now or in the future
- if you need help to build friendships or connect with your family
- if you'd like to work or study now or in the future
- what support you need to build your skills and do more things yourself.



You can use this booklet to help you prepare. Fill in your responses to the questions, or have someone help you, such as a nominee or third-party decision maker.

All the information you give us helps us create your plan. We will keep your personal information safe and secure.

Your details

About you



Name:

Date of birth:

NDIS participant number (found in your access letter):

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 more about you. What people or things are important to you?

Where do you live? Who do you live with? What are your interests? Do you have a job?



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.

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.



Weekly supports



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

This section will help your early childhood partner, local area coordinator or NDIA planner understand:

- what community-based activities you are involved in
- what support you receive from other government services
- if you have received any form of compensation
- what supports you might need in the future.

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

Continue on the next page →



| Day | What I do | To do these things I get support from |
|----------|-----------|---------------------------------------|
| Thursday | | |
| Friday | | |
| Saturday | | |
| Sunday | | |



Occasional activities



What activities or supports do you access 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.

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.

Assistive technology

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

Assistive technology (AT) 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.

To make it easier and quicker for you to get the right assistive technology (AT) in your plan, we don't require quotes for low cost and mid cost AT items. You'll only need to provide quotes for high cost AT, along with advice from an AT advisor or assessor. High cost AT is any item over \$15,000.

More information about assistive technology is available on the [understand assistive technology evidence, advice, assessments and quotes](#) page on the NDIS website and in [Our Guideline: Assistive technology](#).

For example, 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 want to say.

Home and living

Do you need help to live independently?

We want to provide the best option for support in your home, now and in the longer term. We can help explain the different home and living supports and work with you to find the best mix of supports that will help you live as independently as possible.

If you have a goal about home and living in your plan, we may be able to fund home and living supports. We will need to get information about your current and future support needs. This helps us to work out what home and living supports we can fund.

There are different types of home and living supports the NDIS can fund. You can find out more about these supports in [Our Guidelines: Home and living supports](#).

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 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. |
| | | |
| | | |
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What are your goals?

During your planning conversation, we will ask you about your goals so we know how we can help you.

Your goals can be big or small, short term or long term, simple or complex. They can be about anything you want to work towards. 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.

The goals you share will help us build a personalised plan for you. You can set any goals you like, even if they're about things we won't fund supports for.

Have a think about the things you like doing, anything you might like to change or anything new you might like to try. In this section, you can start writing down goals you might like to include in your NDIS plan.

There are some things to remember when setting goals:

- Setting more and bigger goals doesn't mean we'll fund more and bigger funded supports.
- Setting a goal doesn't mean we have an obligation to fund supports that help you pursue that goal.
- Setting a goal about an explicit type or amount of support you might want doesn't mean we have an obligation to fund that support or in that amount.

This is because helping you pursue your goals is only one of the NDIS funding criteria. A support must meet all of the NDIS funding criteria to be funded under the NDIS. So not all supports that help you pursue your goals will be reasonable and necessary supports we can fund in your plan.

For more information about setting goals in your plan please refer to [Our Guideline: Creating your plan](#).



Short-term goals



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

You can usually work towards these goals in 12 months or less. Think about the things you would like to pursue, why you would like to pursue them and how you will know if you are making progress.

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 work towards in the medium to long-term?

You may work towards these goals for several years but it's important to identify the steps towards pursuing 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.

Other important information

Compensation

If you have sought compensation for an accident or event, you will have already supplied information when you applied to access the NDIS. Has anything changed since then? Have you made a new claim since then?

Other areas to discuss

Are there any other areas of your life that you would like to discuss? Do you have any safety concerns or other questions you'd like to ask?



How do you want to manage your NDIS funding?

As part of your planning conversation, we'll ask how you would like to manage your NDIS funding. Your early childhood partner, local area coordinator or NDIA planner can help you choose which option is best for you.

There are three ways to manage your NDIS funding:

1. **Self-managed** – We will pay you so you can pay your providers directly. To find out more about self-management see the Guide to Self-Management on the NDIS website.
2. **Using a plan manager** – We will provide funding in your plan to pay for a plan manager who pays providers on your behalf.
3. **NDIA-managed** – We will pay your providers on your behalf.

You may also have chosen a combination of the above options. For example, you might manage some of the funding yourself, and the NDIA manages the rest.

Self-manage your funding



Self-management is when you manage your NDIS funding. It gives you the flexibility and choice to decide what supports you buy to pursue your plan goals.

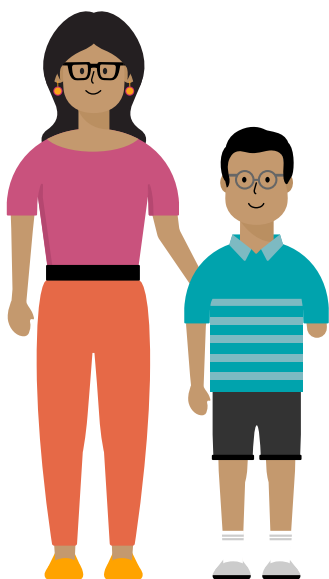
It lets you think creatively about how you can use your funds to best meet your needs.

If you self-manage your NDIS funding you will have:

- **Choice** in deciding what supports you purchase in line with what is included in your plan, who provides these supports and how they are delivered.
- **Flexibility** to use any provider that will best help you to pursue your plan goals.
- **Capacity** to employ or contract staff directly, or have someone employ staff on your behalf.
- **Ability** to negotiate the costs of your supports so you get the best value-for-money and to use savings to buy more or better quality supports.
- **Control** over and responsibility for your NDIS funding so you can manage your own budget for the duration of your plan.

If you want to manage your own funding, there's a few things to keep in mind. You'll also have extra responsibilities, like keeping receipts for what you buy with your funding. You'll also have obligations as an employer if you chose to employ staff directly.

Learn more about self-managing in the [Guide to Self-Management](#) available on the NDIS website or ask your early childhood partner, local area coordinator or NDIA planner for a copy.



“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

Use a plan manager to help you manage your funding



Using a plan manager means you employ an organisation or individual to support you to manage the funding in your NDIS plan.

Your Plan Manager will pay your providers for the supports you purchase, help you keep track of your funds and do any financial reporting for you.

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

Have the NDIA-manage your funding



You can choose to use the NDIA to manage your NDIS funds. The NDIA will directly pay

registered providers of your choice for the services they provide to you, on your behalf.

You cannot use unregistered providers when your plan is NDIA-managed.

You can keep track of your budget by looking on the [myplace portal](#) or [my NDIS app](#) to see what payments are being made to your providers, but you don’t have to pay any invoices or do any book-keeping.

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 | ✓ | ✓ | ✓ |
| Negotiate pricing to pay less than the NDIS Pricing Arrangements and Price Limits | ✓ | ✓ | ✓ |
| Pay more than the NDIS Pricing Arrangements and Price Limits | ✓ | No. Providers delivering supports to a participant using a Plan Manager cannot charge more than the NDIS Pricing Arrangements and Price Limits. | No. Providers delivering supports to a participant whose plan is managed by the NDIA cannot charge more than the NDIS Pricing Arrangements and Price Limits. |
| View my plan on the myplace portal or my NDIS app 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, ask your early childhood partner, local area coordinator or NDIA planner before or during your planning conversation.



Your questions for the planning conversation

| Question | Answer |
|----------|--------|
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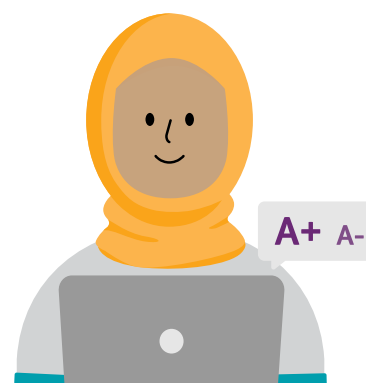
During your planning conversation

What to bring to your planning conversation?

If possible, please bring:

- ✓ 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 for more information.
- ✓ Your bank account details, if you are considering self-managing all, or some of your NDIS funding.
- ✓ 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 (if not already completed in this booklet).
- ✓ Your myGov login and password details (if you need help with this, talk to your early childhood partner, local area coordinator or NDIA planner) so you can log on and we can show you how to use the NDIS myplace portal.

During your planning conversation, you can tell us whether you want a copy of your plan in an accessible format, such as braille, electronic text (on CD), large print, audio (on CD) — or translated into your preferred language.

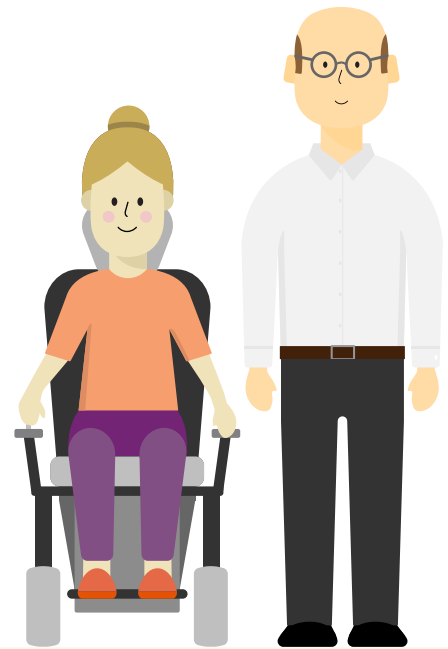


Who can come with you?

You can come to the planning conversation by yourself or bring along a family member, friend, advocate or anyone else. The person you bring will need to provide proof of identity.

If you want help to arrange an advocate to attend with you, contact your early childhood partner, local area coordinator or NDIA planner.

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.



Actions, notes and ideas

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

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 conversation.

After your planning conversation

Approving your plan

Following your planning conversation, your early childhood partner, local area coordinator or NDIA planner will start making your plan within 21 days and then submit it to the NDIA who provides final approval.

The NDIA will approve your plan within 56 days (for participants aged over 7) or 90 days (for participants aged under 7). These timeframes are set out in the [Participant Service Guarantee](#).

We may take longer to approve your plan if we need you to give us more information or get an assessment.

Once your plan is approved

Once we approve your plan, you'll get a copy within 7 days. We'll ask in your planning conversation about how you'd like to receive your plan.

We usually send it out by mail. You can also find it on the myplace participant portal and my NDIS app as soon as we approve it. You need to have a myGov account to access the myplace participant portal. To create your myGov account, go to the website my.gov.au.

If you need help to create your myGov account or want to know more about the NDIS myplace portal, contact your early childhood partner, local area coordinator or the NDIA. You can also call the myGov helpdesk on 13 23 07.

If you have a nominee or child representative, they'll get a copy too. You can also ask us to share it with other people. We can only share your plan where you ask us to. Learn more about this in [Our Guideline: Your privacy and information](#).



‘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



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

If you disagree with the goals in your plan, these can be changed at any time and will not affect your funding. Your early childhood partner, local area coordinator or NDIA planner will help you change them immediately. You can find more information about our review process and timeframes in the [Participant Service Charter](#) on the NDIS website.

If you're not happy with your current plan, you should talk to your early childhood partner, local area coordinator, support coordinator, recovery coach, or planner.

They may be able to explain the decision, clarify how you can use the funding, or help you fix any problems. It's a good idea to do this soon after you get your plan.

We can also give you written reasons on why we made the decision. [Contact us](#) if you'd like reasons for our decision.

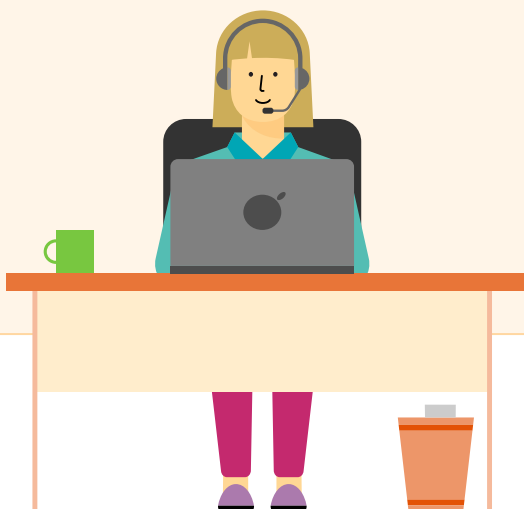
If you don't agree with our decision to approve your plan, you have the right to ask us for an internal review. You have 3 months to ask for an internal review. This is 3 months from the day after you receive our decision in writing. If you ask us after 3 months, we'll let you know what other options you have.

Having an internal review means someone who wasn't involved in creating your plan will review our decision to approve your plan. They'll consider if we made the right decision under the laws for the NDIS.

If you have asked for a review, you can continue to use your plan while you wait for the decision. We will complete the review within 60 days.

If you still don't agree with our decision after the internal review, you can ask the Administrative Appeals Tribunal to review our decision. We call this an external review.

Learn more about [reviewing our decisions](#).

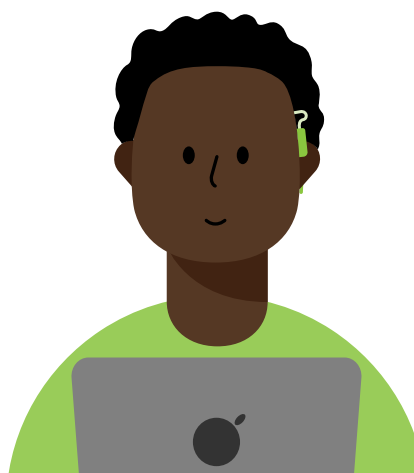


What happens next?

- Once you have a plan, you can start using it to pay for your supports.
- Your plan officially 'starts' on the day we approve it. Your local area coordinator, early childhood partner or support coordinator can help you start using your plan.
- We can only pay for supports you buy after your plan starts.
- During your plan, we'll check-in with you to see how you're going, and how your plan is working for you.
- Your plan ends when we create a new one, or you leave the NDIS. Your plan doesn't expire or stop, even if we haven't created a new plan by the plan reassessment due date. You are never left without funding or supports.

You are now ready to move to Booklet 3

Using your NDIS plan



Notes



Notes





National Disability Insurance Agency



Telephone 1800 800 110



Webchat [ndis.gov.au](https://www.ndis.gov.au)

Follow us on our social channels



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

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