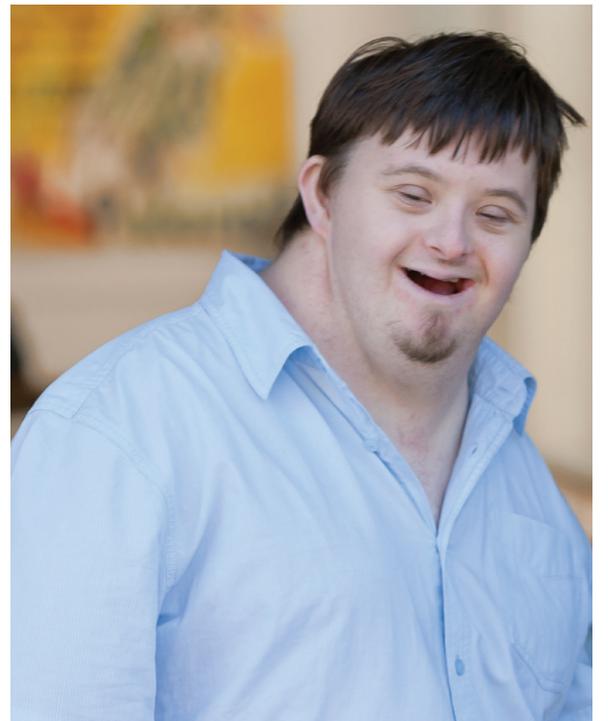
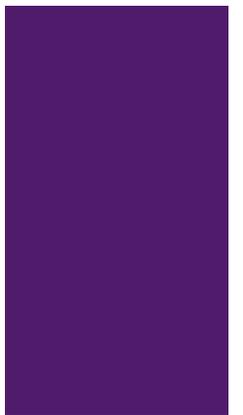




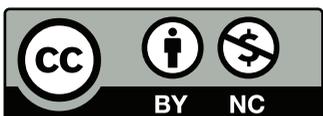
Australian Government

# NDIS planning workbook



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# Advice from an NDIS planner

Since the NDIS began, planner Fiona Cranny has helped many families with children and youth living with disabilities.

Her advice is to use this workbook to help kick start the conversation in the planning and assessment meeting.

“There are no right or wrong answers in this planning document. It is just a starting point for us to work together,” Fiona says.

“Meetings that take place when the workbook has not been completed often take a bit longer as there is more information to think about and gather in the meeting.

“Every plan is individualised. We start with broad objectives, such as improved social participation, or mobility, or speech and language development. Once we know what the goals are, we can look at what strategies and supports will help achieve those goals.

“As I work with youth, I’m usually speaking with parents about their children. We encourage families to think about the big picture for their child, about what they would like to see their child achieving in a few years’ time.

“Then we help the families break down these goals to short term objectives that could be achieved over 12 months, which is the length of the plan.



“Adults are in charge of their own plans, however, they can ask a family member, friend or carer to help them and come to the meeting with them as well.

“I encourage people to think about all the supports they may require. They don’t have to prioritise these as each potential funding support is determined by need.

“So don’t sweat the detail before you get to your meeting. Instead, make a cup of tea and have a think about where you would like to get to. Use this planning guide as a prompt.

“We encourage people to think outside the box,” Fiona says.

# Welcome to the National Disability Insurance Scheme

The National Disability Insurance Scheme (NDIS) is available for Australians up to age 65 that are living with a permanent and significant disability. To participate in the NDIS, you need to meet certain disability or early intervention requirements.

If you are unsure whether you are able to access the NDIS, visit [ndis.gov.au](http://ndis.gov.au) and complete My Access Checker before completing this planning guide.

This planning workbook is for people who are able to access the NDIS. It has been designed to assist you through the process of developing your individual plan. It will help you identify your needs, goals and current supports. There are a number of questions for you to think about, and you can note your thoughts in the following pages.

This workbook will also help you complete your Participant Statement. Your Participant Statement is a form that helps us understand your personal situation and what you would like to achieve. It gives us the information we need to tailor your NDIS plan. If you are able to complete it, please bring it to your first planning meeting. Otherwise, bring this workbook with you and your planner will help you fill in the Participant Statement.

## The NDIS planning process

There are five steps involved in developing your plan of supports.



## Step 1 – Think about your needs and goals

Before you meet your planner, think about what you want and need.

- What support do you need to do everyday activities?
- How would you like your life to be in a few years?
- How can the NDIS help you?

You may decide to discuss these questions with your family, friends or carer.

Your planner will consider supports that will help you:

- pursue your goals and aspirations
- increase your independence
- take part in employment or community activities.

Together you will discuss informal, community and mainstream supports available to you. These include family, friends and community services, or more formal supports such as health and education services.

Should you require them, the NDIS funds reasonable and necessary supports.

These supports could include assistance with employment or in the workplace, therapies, home modifications, mobility equipment, or vehicle modifications.

At your first planning session, we will discuss what you are doing now and what you would like to try in the future. We will talk about three aspects of your life:

- your daily routine
- your living arrangements
- your current relationships and supports from other people.

Use the spaces on the following pages to make notes about these aspects of your life.

## What is your life like now?

Your Participant Statement includes information on your day-to-day life. Think about:

- what you participate in such as education, work and social activities
- what is working well in your life
- what you would like to change or improve
- whether there is something new you would like to try (this could be a therapy, an activity in your local community or a volunteer group you would like to join)
- activities you enjoy or you are good at
- what you do when someone comes to help you in your home.

Write your notes here

It may help to fill in the timetables on the next page.

### Regular activities

Day	What I do	What help I have
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

### Occasional activities

Month	What I do / how often	What help I have

# Lynne Foreman

## “Living my life the way I want”

Lynne Foreman, one of the first through the door when the NDIS began in Geelong, says that while the personal planning process may seem a bit complex at first, there are simple steps you can take to make it a lot less daunting.

Born with a muscle disorder that causes multiple joint contractures, Lynne relies on a wheelchair and assistance from others for daily tasks. She explained that bringing an advocate to her planning meeting and listing her current supports and aspirations was a big help.

“The more input you have into your plan, the better the outcome will be for you,” Lynne says.

“Before my initial meeting I made two lists.

“The first ran through the assistance I already received, such as the hours I had for showering, housework, shopping and other supports like bowel massage.

“The second focused on what I wanted to achieve through the NDIS.

“Thinking about what you want, what you really want, is quite difficult. You don’t want to be greedy and you are so used to fighting for a few extra hours. It was hard to take a step back.

“My list ended up including more flexible support hours, a bit longer for help with my bath and a replacement power chair as mine was so old it kept breaking down.

“I also asked for funding to cover massage and acupuncture as I have shoulder issues. I can weight bear, so I don’t need help getting into my bed, but if I didn’t get treatment for my shoulder, that ability would be at risk.”

At the meeting, Lynne’s planner discussed her goals and aspirations and then turned to the specifics of her personal plan.



“It was daunting at first, as instead of hours they talk about money, which I am not used to, and I also forgot a few things, so it was great having both my advocate and husband there to help jog my memory.

“My plan has now led to flexible support hours, which means I can be more spontaneous.

“Previously, if someone rang me at midday and invited me to the movies that night, there would have been no way I could get a carer to help me change. Now, I know I have the hours, so I can ring them up and ask for someone to come at 4pm.

“So your goals can be about flexibility and seeing your friends, as well as specific things you need or want to do.

“I am finally getting all the support I need to live my life the way I want.”

## What are your current living arrangements?

Think about:

- who you usually live with
- the type of accommodation you live in
- whether there is something you would like to change about your living arrangements to make things easier for you, or to increase your independence.

Write your notes here

Use this information to help complete page 2 of your Participant Statement.

## What relationships do you have now?

Think about:

- who is important in your life and in what way
- what informal supports you have from family, friends, or neighbours.

Write your notes here

Use this information to help complete page 2 of your Participant Statement.

## What supports do you currently have?

### Programs and therapies

Think about:

- specific programs you access, such as those provided by your local council, religious, community or support groups, your hospital or school
- any therapies you require, such as therapeutic support or behaviour support.

Write your notes here

### **Aids, equipment or modifications**

Think about:

- any special equipment you have or you need. For example, a wheelchair, hearing or speech aid or hoist. How often do you use this equipment? Is it appropriate for your needs?
- whether your home has been, or needs to be, modified. Do you have or need any ramps or lifts?

Write your notes here

### **Assistance with activities**

Think about:

- what assistance you have to carry out your day-to-day activities, including participating in work or study, transport, sport, day program or community access, managing money, respite etc.
- what formal supports you have through the health care system, community centres, work or education, cleaners, personal helpers etc.

Write your notes here

Use this information to help you complete pages 4 and 5 of your Participant Statement.

## Your goals

There may be things you want to achieve in the short and longer term.

Think about:

- the supports you already have in place
- if something is stopping you from achieving your goals
- what steps you need to take to get where you want to be.

Use the spaces below to write down your goals in different areas of your life. You don't need to write in every box; just those most important to you.

**Employment** – e.g. would you like to get a job, volunteer or change your work hours?

Write your notes here

**Education** – e.g. would you like to attend school, university or a course?

Write your notes here

**Social participation** – e.g. would you like to join a club, be more able to attend events, see your friends or make new friends?

Write your notes here

**Independence** – e.g. would you like to get around the house or community on your own or with less assistance?

Write your notes here

**Living arrangements** – e.g. would you like to modify your home or live somewhere different?

Write your notes here

**Health and wellbeing** – e.g. would you like to be more active or take up a sport?

Write your notes here

Use this information to help complete pages 6-9 of your Participant Statement.

## Step 2 – Meet with your personal planner

### What to expect

A planner from the NDIS will arrange to meet at a time and place that is convenient for you.

At this meeting, you will have a conversation about your life, including the things you have noted in this workbook. If you want, you can bring someone with you to this meeting.

Together with your planner you will talk through your Participant Statement.

### How long will the meeting take?

The time required is different for each person. You may only need one meeting, or you may need more. Your planner will take the time you need to talk through what's important to you and help you make decisions.

### Carer statements

If you have a carer, that person may also wish to make a statement about the care they provide. If this is the case, your planner will ask for your permission.

## Sample meeting agenda

Introductions	Your planner will introduce themselves and outline what you will talk about in the meeting.
Your preparation	<p>Your planner will ask if you understand the information in this workbook and the materials sent to you before the meeting.</p> <p>Don't worry if you have not been able to complete the Participant Statement paperwork.</p> <p>Your planner can help with this.</p>
Your Participant Statement	<p>You will discuss:</p> <ul style="list-style-type: none"> <li>• your current situation: living arrangements, social activities, employment</li> <li>• your current supports and what is working well</li> <li>• what you would like to achieve</li> <li>• what you would like to change</li> <li>• your goals and aspirations.</li> </ul>
Setting your objectives	You and your planner will turn your goals and aspirations into a set of actions.
Developing your strategies	Your planner will help develop the steps you need to take to achieve your goals and aspirations.
Measuring your achievements	You will discuss how you and your planner will be able to tell if your personal plan is working.
Managing your personal plan	Your planner will talk to you about options for managing your plan.
Setting review dates	You and your planner will agree on review dates for your plan.
Next steps	<p>You may need a second meeting to finish your planning conversation. If this is the case, you will agree on a time.</p> <p>Once your planner has all the information they need, they will develop a plan of supports for you.</p> <p>Your planner will tell you when you can expect to receive your plan of supports and what will happen next.</p>

## Step 3 – Develop your plan and consider how to manage your supports

Using the information gathered during your planning meeting, your planner will determine which supports will best meet your needs and help you achieve your goals. Your planner will then write up your plan of supports.

Sometimes a specialist assessment may be required to make sure your personal plan includes the right supports to meet your needs. This may involve a medical, psychological or other examination by a qualified person. If this is required, we will discuss why, how it will be done and what information will be given to us.

### Managing your funding

If you have NDIS funded supports in your plan, your planner will talk to you about how you would like to manage that funding. A number of options are available.

- Manage your funding yourself. This means you will be given funds from the NDIS to pay directly to the people and organisations providing the support.
- Nominate another person to manage your funding. This is called a ‘plan nominee’.
- Use a registered plan management provider. Your planner can help you find one.
- Ask the National Disability Insurance Agency (NDIA) to manage your funding for you.
- A combination of the above options.

## Early intervention for Mason

Renee Brown’s goal for her son Mason is for him to do everything other toddlers do.

At six months Mason was diagnosed with hemiplegia, meaning his muscles are prone to tightness down the right side of his body.

Before attending her first NDIS planning meeting, Renee thought about her goals for Mason. She also talked to his therapists about what the next year would hold. Mason’s planner guided Renee through the planning process and developed a plan to meet their needs.

Mason now has occupational and speech therapy every fortnight and a half hour of hydro therapy every week. Every three months he sees his physiotherapist and his plan also allows for orthotics and hand splints.



“Hopefully, with early intervention support through the NDIS, he won’t need as much support later. We already have an eye on a mainstream school for him,” Renee said.

## Step 4 – Implement your plan

Your planner will send you a copy of your plan.

Your planner will also talk to you about how confident you feel in managing money and coordinating the supports in your personal plan. You can have as much or as little assistance as you want.

The table below may help you decide how to implement your plan.

	By myself	With a little help	With a lot of help
I am confident in <b>researching</b> service providers that could deliver funded supports approved in my plan.			
I am confident in <b>contacting</b> service providers who could deliver the funded supports approved in my plan.			
I am confident <b>meeting</b> and <b>interviewing</b> service providers who could deliver funded supports approved in my plan.			
I am confident in <b>deciding</b> which service providers would best suit my needs, as approved in my plan.			
I am confident in <b>making an agreement</b> for services or supports with a provider who has agreed to deliver the funded supports or services approved in my plan.			

The important thing is, **you decide what works best for you.**

## Step 5 – Review your plan

Your planner will determine the most appropriate supports to help you achieve your goals and aspirations. You will be able to discuss those supports with your planner and decide if they are right for you. You and your planner will also agree on review dates for your plan.

We understand your circumstances may change. If that happens you can arrange to meet your planner so you can update your plan to meet your needs.



## MORE INFORMATION

Phone 1800 800 110  
(8am to 8pm Monday to Friday)  
Website [ndis.gov.au](http://ndis.gov.au)  
Email [enquiries@ndis.gov.au](mailto:enquiries@ndis.gov.au)

### **TTY users**

Phone 1800 555 677  
then ask for 1800 800 110

### **Speak and Listen** (speech-to-speech relay)

Phone 1800 555 727  
then ask for 1800 800 110

### **Internet relay users**

Visit the National Relay Service website at [relayservice.gov.au](http://relayservice.gov.au) and ask for 1800 800 110.