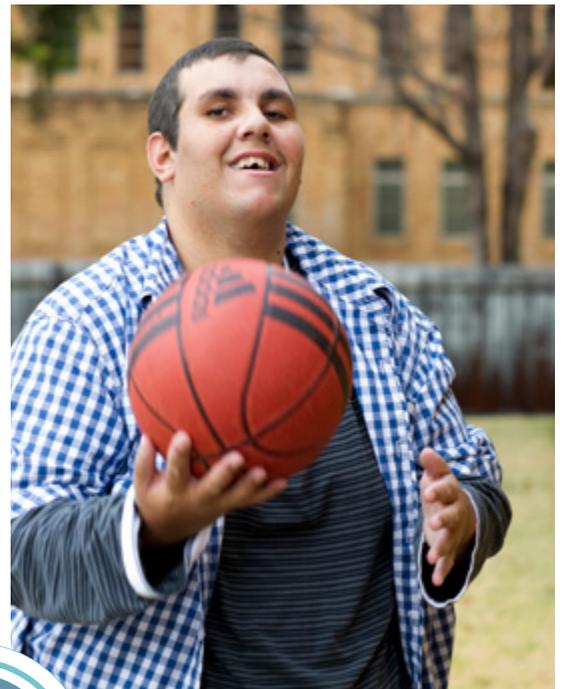
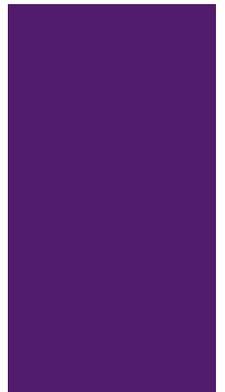




Australian Government

NDIS planning workbook

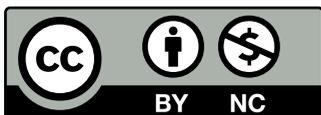
HELPING YOU THROUGH THE NDIS PLANNING JOURNEY



ndis National Disability Insurance Scheme

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Advice from an NDIS planner

Since the NDIS began, planner Fiona Cranny has helped many families with children and teenagers 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 collect in the meeting.

“Every plan is individualised. We start with some 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 supports will help them achieve those goals.

“As I work with young people, 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 some 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 need. 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 start.

“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 who have a permanent and significant disability. To participate in the NDIS, you need to meet certain disability or early intervention requirements.

If you don't know if you can access the NDIS yet, visit [ndis.gov.au](https://www.ndis.gov.au) and complete **My Access Checker** before completing this planning guide, or call **1800 800 110** to speak to someone from the NDIS.

This planning workbook is for people who are able to access the NDIS. It has been designed to walk you through the steps 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 on 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 with you to your first planning meeting. Don't worry if you can't finish it – bring this workbook with you and your planner can help you fill it in.

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?
- What do you want your life to be like in a few years?
- How can the NDIS help you?

You may decide to discuss these questions with your family, friends, carer or someone else in your community.

Your planner will consider supports that will help you:

- pursue your goals and aims
- increase your independence
- take part in 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 help finding work, therapies or equipment to help you get around more easily. For example, wheelchairs and walkers, or changes to your home or car that will improve your everyday life.

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 day-to-day activities
- your living arrangements
- your current relationships and supports from other people e.g. family, friends, carer or others in your community

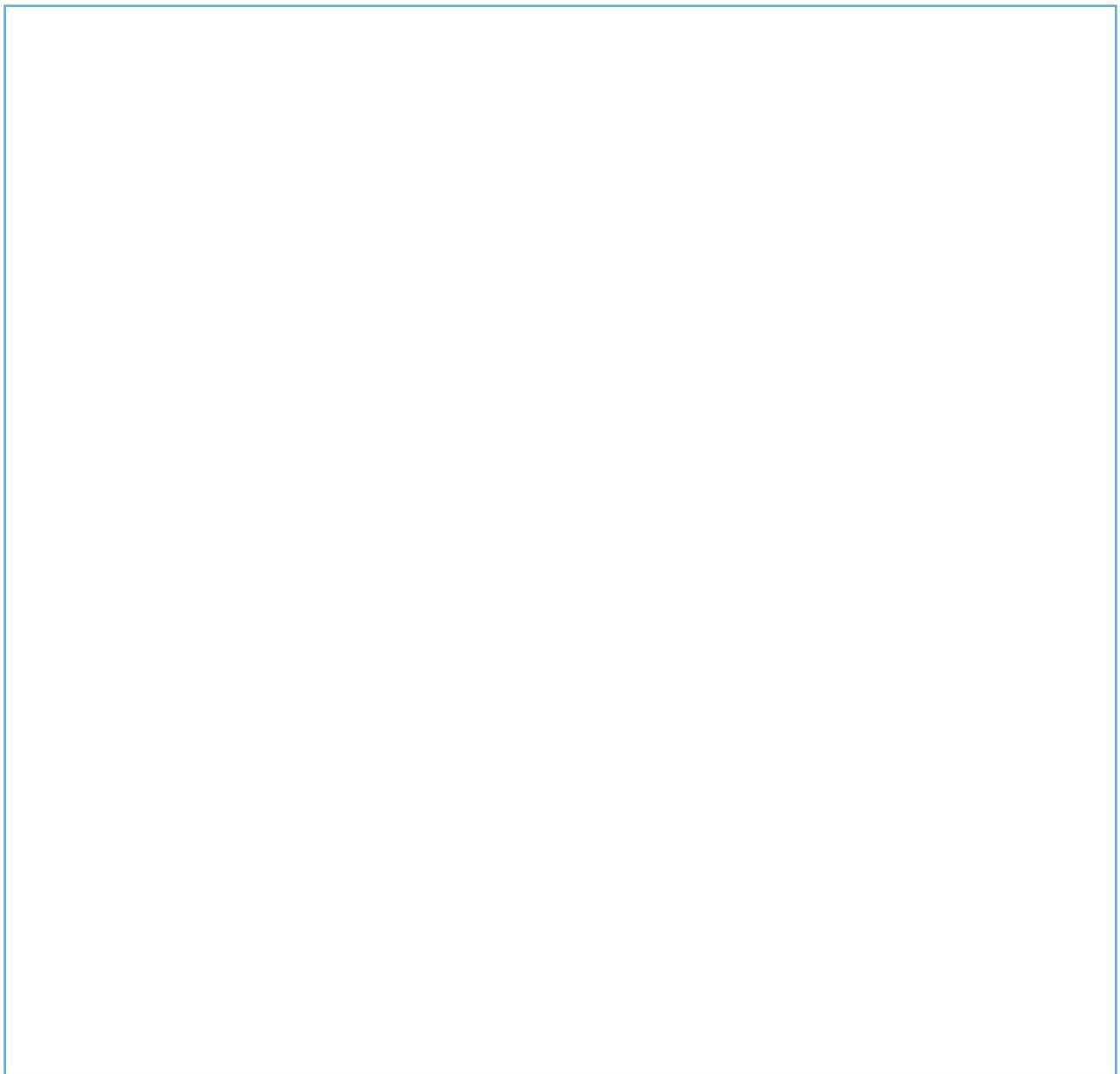
Use the spaces on the following pages to make notes about these aspects of your life.



What is your life like now?

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

- activities you participate in such as education, work or social activities
- what is working well in your life
- what would you like to change or make better
- 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.



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

Things I do every day

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

Things I do sometimes

Month	What I do / how often	What help do I have?

Zac's story

Zac Ahoy is a 19 year old Aniwun man who wants to represent Australia at the Paralympic Games in Boccia and live more independently in his every day life.

The youngest of six children, Zac was born with cerebral palsy and uses a wheelchair. He says he has an incredibly loving family who would do anything for him, but one day he hopes to be able to move out and live in his own place.

“It’s funny, because everyone always tries to get out of doing the washing up, but I want to be able to do it,” he says. “I want to learn how to cook and clean and be able to go to the toilet by myself – all the things any normal person can do.”

Zac and his family recently met with Sam, a personal planner from the NDIS. Sam talked about supports that might be available to help Zac achieve his goals.

“The planning process is about working through what you need and making decisions together,” Sam said. “Before you come to your planning meeting, it is really helpful if you think about your goals and the supports you need for your life.”

For Zac, this means getting things like rails installed in the bathroom, and supports to make it easier to get around and do things by himself.



Zac’s mum, Jill, was at the planning meeting to help Zac work out what supports he needs.

“I’m looking forward to finding out more about the NDIS, and how it will help Zac achieve his goals. Even if it might be a few years before he can live on his own, this is a good start,” Jill said.

“It’s also comforting to know that if things change, we can review Zac’s plan to make sure things are always tailored to what he needs.”



What are your current living arrangements?

Think about:

- who you normally 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 better for 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 the information in your answers 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 your local council, cultural or community groups or support groups (e.g. your local Aboriginal Medical Service), or a 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 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 the information in your answer to help complete pages 4 and 5 of your Participant Statement.

Your goals

There may be things you want to achieve now and in the future.

Think about:

- the supports you already have in place
- if something is stopping you from achieving your goals
- what steps do 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 write down those most important to you.

Employment (working in a job) – e.g. would you like to get a job or change your work hours?

Write your notes here

Education (learning something new through training or study) – e.g. would you like to attend school, university or a course?

Write your notes here

Social participation (being involved in the community) – e.g. would you like to join a club, be more able to attend events or see your friends?

Write your notes here

Independence (being able to do things on your own) – 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 (where you live) – e.g. would you like to modify the place where you live or live somewhere different?

Write your notes here

Health and wellbeing (how you feel and staying healthy) – e.g. would you like to be more active or take up a sport of some kind?

Write your notes here

Use the information in your answers 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.

Let your planner know if you need a translator for your meeting.

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	Your planner will ask if you understand the information in this workbook and the materials sent to you before the meeting. Don't worry if you haven't finished the Participant Statement paperwork. Your planner can help with this.
Your Participant Statement	You will discuss: <ul style="list-style-type: none"> • your current situation: living arrangements, social activities, employment, etc. • your current supports and what is working well • what you would like to achieve • what you would like to change • your goals and aims.
Setting your objectives	You and your planner will turn your goals and aims into a set of actions.
Developing your strategies	Your planner will help develop the steps you need to take to achieve your goals and aims.
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	Agree on review dates for your plan.
Next steps	Set another meeting if required. Once your planner has all the information they need, they will develop a plan of supports for you. Your planner will tell you when you can expect to receive your plan of supports and what will happen next.



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 plan yourself. This means you will be given funds to pay directly to the people and organisations providing the support.
- Choose another person to manage your plan. 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 plan for you.
- A combination (mix) of these options.



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 plan. You can have as much or as little help as you want.

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

	No help needed	Yes, a little help	Yes, a lot of help
I need help researching providers and services that could deliver funded supports approved in my plan.			
I need help contacting service providers who could deliver the funded supports approved in my plan.			
I need help meeting and interviewing service providers and services who could deliver funded supports approved in my plan.			
I need help deciding which providers and services could deliver funded supports approved in my plan.			
I need help making an agreement for services or supports with a provider who has agreed to deliver the funded supports or service approved in my plan.			

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





Step 5 – Review your plan

Your planner will find out the best supports that will help you achieve your goals. You will be able to talk about those supports 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 with your planner so you can update your plan to meet your needs.



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MORE INFORMATION

Phone **1800 800 110**
8am to 8pm, Monday to Friday
Website **ndis.gov.au**
Email **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 and ask for **1800 800 110**.

