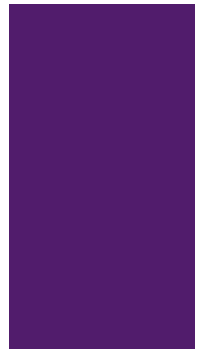




Australian Government

# NDIS planning workbook



**ndis** National Disability Insurance Scheme

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## How to use this workbook



This information is written in an easy to read way.  
We use pictures to explain some ideas.



Some words are written in **bold**. We explain what these words mean. There is a list of these words on page 38.



You can ask for help to read this NDIS planning workbook. A friend, family member or support person may be able to help you.

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# What is the National Disability Insurance Scheme?



The National Disability Insurance Scheme is a way of providing care and support to people with disability in Australia. In this document, we will call it the NDIS.



The NDIS provides support for:

- People living with a **permanent** disability. This means they have a disability that won't go away.



- People living with a **significant** disability. This means people who have a major disability.



- People who are Australian citizens. Australian citizens can be born here or have paper work that says they can live here.



- People who are under 65 years old when they start with the NDIS.



You can use My Access Checker at [www.ndis.gov.au](http://www.ndis.gov.au) to make sure you are able to use the NDIS.

## What can the NDIS support you with?



The NDIS funds **reasonable** and **necessary** supports.

Reasonable supports are fair and balanced.

Necessary supports are those that you must have.



Reasonable and necessary support will mean you can be more independent and work toward your goals.



These supports could include help with:

- getting or keeping a good job



- therapies you need



- changes to your home



- equipment you use



- changes to your car.

Other examples of support include the support you receive from:



- family and friends



- community and disability services



- health services



- education services.

## Making a plan



When you start using the NDIS, you will need to make a plan to help you reach your goals.



Everybody's plan is different.

This is because everyone has different needs.



Your plan will include information about:

- your support needs
- your goals
- your current supports.



This NDIS planning workbook will:

- help you understand the planning process
- help us understand exactly what kind of support you need.



You will have a meeting with a person called a planner. He or she will help you make the plan.





You can also ask someone you trust to help you with your plan. This might be someone like a friend, family member or an **advocate**.

An advocate is someone who supports and speaks up for people with disabilities.



At your first planning meeting we will talk about:

- what you are doing now
- what you would like to try in the future.

We will also talk about the different parts of your life.

On the next few pages, we have provided tips for what you can think about before the planning meeting.



We've also provided space to write things down.



Writing these things down really helps with your first planning meeting.



And, the things you write down will help you to complete the **Participant Statement**.



This is a document that helps us get to know you.



Please make sure you bring your Participant Statement to your first planning meeting with your planner.

This workbook has 5 parts for you to think about before your planning meeting.





## Part 1 – Think about your needs and goals

Before you meet with your planner, it's a good idea to think about these things:



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



You might like to talk about these things with your family, friends or a carer.

### What is your life like now?

Here are some things to think about:



- Activities you take part in. This might include things you do at school or work. And it might include social activities and the things you do for fun with your family or friends.



- Things that are working well in your life.



- Things you would like to change or make better.



- Anything new that you would like to try, such as a new activity or service.



- What you do when someone comes to your home to help you.

You can write your answers in the space below.

Write or draw your notes here...



### Activities that I do all the time

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

### Activities that I do sometimes

Month	What do I do?	How often do I do it?	What help do I have?

## Where do you live and who do you live with?



Who do you normally live with?



What kind of house do you live in?

For example, you might live in:

- a unit or apartment
- a house
- a granny flat
- a townhouse.



Is there something you would like to change about how you live now?

Write or draw your notes here...





## Who are the important people in your life?



This might include:

- friends
- family
- community groups
- social workers
- physiotherapists
- carers.

Are there people who help you in your day to day life?

These people might help you with:



- travel
- cleaning
- looking after your money
- taking part in social activities
- work
- study.

Write or draw your notes here...



## What services and equipment do you currently use?



Some of the services you use may be provided by:

- your local council
- religious groups
- disability service providers
- community groups
- support groups
- hospitals, doctors or other health care professionals
- school.



Has your home been changed to help you move around more easily? This may include changes like ramps or lifts.



Do you use any equipment like a wheelchair or hearing aid?



How often do you use this equipment?

Write or draw your notes here...



## What supports do you have now?

The supports you receive might be **formal** or **informal**.

**Formal support** is support you get from places like:

- community or disability services
- school or university
- sporting organisations
- hospitals, doctors and other health care professionals.



**Informal support** is support that you might get from your friends or family.

You can make notes about these supports in the table below.

Formal supports	Informal supports

## Your goals



You might have goals for different areas in your life.



Long term goals are goals you would like to reach over a long period of time.



Short term goals are goals that you would like to reach soon and more easily.



What support do you need to reach your goals?




Is there anything stopping your from reaching your goals?




What actions do you need to take to get to where you want to be?


You can use the boxes below to make notes about your goals.

You do not have to write in every box. Just write down the goals that are most important to you.

<p>✓ <b>Education</b></p> <p>Would you like to learn new things or do a course?</p> 	<p>Write your goals here...</p>
---	---------------------------------

<p>✓ <b>Work</b></p> <p>What are your goals for working in a job? Would you like to get a job or change your hours?</p> 	<p>Write your goals here...</p>
---	---------------------------------

<p>✓ <b>Taking part in the community</b></p> <p>Would you like to do new activities and make new friends?</p> 	<p>Write your goals here...</p>
---	---------------------------------

<p>✓ <b>Where you live and who you live with</b></p> <p>Would you like to move?</p> 	<p>Write your goals here...</p>
---	---------------------------------

<p>✓ <b>Staying healthy</b></p> <p>Would you like to do more exercise or take up a sport?</p> 	<p>Write your goals here...</p>
---	---------------------------------

<p>✓ <b>Doing things on your own</b></p> <p>Would you like to get to do more things with less help from others?</p> 	<p>Write your goals here...</p>
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## Case study: Lynne Foreman



Lynne Foreman was born with a muscle disorder that affects her joints.

She needs to use a wheelchair and the help of other people for daily tasks.

Lynne used the NDIS planning workbook. She filled it out before her first planning meeting.

Lynne worked with an advocate and her husband to create her plan. They helped Lynne work out what her goals were and the support that she needed.

Before her first planning meeting, Lynne made 2 lists:

1. Support she already had.
2. Goals she wanted to reach with the help of the NDIS.

Lynne said that making a list of all her goals and current supports was a big help. Lynne decided that she needed more help with her bath. She also needed to replace her power chair because it was getting old and kept breaking down. Lynne also asked for funding to help with therapy she was getting for her shoulder problems.

Together Lynne, her support people and the NDIS planner were able to create a plan that would be best for her. It is helping her reach her goals and she is getting the support she needs to live the life she wants.





## Part 2 – Meet your personal planner



A planner from the NDIS will contact you to organise a meeting when you are ready.

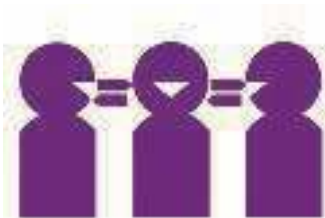


At this meeting you will talk about your life and goals.

You should bring the notes you have made in this workbook to your meeting.



If you want to, you can bring someone to this meeting. This may be a friend, a family member or an advocate.



Tell your planner if you need a translator.



If you have a carer, they might like to say something about the care they give you.

Your planner will ask you if this is OK.



Not everyone needs the same amount of time to make their plan. You might only need 1 meeting or you might need a few.



Your planner will take the time to talk to you about what is best for reaching your goals and creating a good plan.

On the next page is an example of a meeting **agenda**.

This is to show you how a planning meeting usually goes.

# Planning Meeting Agenda

Attendees

Date

- Getting to know you
- Reading your notes in the workbook
- Setting your goals
- Knowing when you have reached a goal
- Managing your plan
- Reviewing your plan
- Talking about what is next



## Part 3 – Develop your plan



Using the information gathered during your planning meeting, your planner will come up with a plan that best suits your needs and helps you reach your goals.



From this plan, your planner will be able to decide the best kind of supports you will need.

### Sometimes a specialist assessment is needed



A **specialist assessment** is an exam that a specialist like a doctor or therapist will do.



Sometimes this assessment is needed to make sure you are getting the right supports to meet your needs.



If you need to have this kind of assessment, we tell you:

- why you need to do it
- how it will be done
- what information it will give us.

## How will you manage the funding for your plan?



Your planner will also talk about how you will manage the plan from day to day.

There are a few options that you can choose from:



### **Look after the plan yourself.**

This means the NDIS will give you money so you can organise and pay for your own supports.



### **Have someone else manage the plan.**

This means you will choose someone to help you with your plan. This person is called a **plan nominee**.



### **Use a registered plan management provider.**

This is an organisation that will manage your funds for you. Your planner can help you find a provider.



### **Ask the NDIA to look after the plan.**

This means the NDIA will make sure that your plan is working well.



### **A mix of all these options.**

This means you can create your own way of looking after your plan.

## Part 4 – Carry out your plan



Your planner will send you a copy of your plan for you to sign.



Your planner will also talk to you about how you wish to manage your money and supports in the plan.

You can have help with this if you would like.

There is an activity below that might help you decide the best way to manage your plan.

I am confident that I can look for service providers to help me reach some of the goals in my plan:

- by myself
- with a little help from other people
- with a lot of help from other people.



I am confident that I can contact and talk to service providers to help me reach some of the goals in my plan:

- by myself
- with a little help from other people
- with a lot of help from other people.



I am confident that I can meet and interview service providers to help me reach some of the goals in my plan:

- by myself
- with a little help from other people
- with a lot of help from other people.



I am confident that I can make an agreement for service providers to help me reach the goals in my plan:

- by myself
- with a little help from other people
- with a lot of help from other people.





I am confident that I can decide which service providers will be best to help me reach the goals in my plan:

- by myself
- with a little help from other people
- with a lot of help from other people.



After thinking about these things I have decided that:

- I am going to look after my plan myself and contact my planner if I need help.
- I am going to look after my plan myself with some help from a support person like a friend, family member or another person that I trust.
- I am going to need a lot of help looking after my plan.

## Advice: Fiona Cranny



Fiona Cranny is an NDIS planner.

She has some useful information for people who are going to use an NDIS plan to reach their goals.

The first thing Fiona suggests is writing down any thoughts you have about the plan. She says there are no right or wrong answers to the questions in this workbook.

Fiona says that if you come to a meeting without filling out the questions in this book, it might take longer for your planner to work out what you need.

She says: “If you know what you want from the start then we are able to talk about the different options you have straight away. The NDIS is different because it’s about helping people take part in community and social activities more than they may have been able to before.”

## Part 5 – Review your plan



We know that sometimes things can change in your life. You might want to change your plan if it is not working for you.



If this happens, you can meet with your planner and change your plan to better meet your needs.

## Where to get more information

If you want more information you can contact:



1800 800 110  
8am – 8pm  
Monday – Friday



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

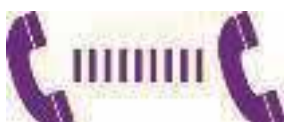


[enquires@ndis.gov.au](mailto:enquires@ndis.gov.au)



### **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



### **Visit your local NDIS office**

Find your local NDIS office at  
[www.ndis.gov.au/about-us/visit-us](http://www.ndis.gov.au/about-us/visit-us)

## Word list



### **Advocate**

Someone who supports and speaks up for people with a disability.



### **Agenda**

A list of a plan of things that need to be discussed during a meeting.



### **Formal support**

This is support from an organisation, a community or a group that works with people who have disabilities.



### **Informal support**

This is support you get from friends or family.



### **Necessary**

Something that you must have.



### **Participant statement**

This is a document that helps us get to know you.



### **Permanent**

Something that won't go away.



### **Plan nominee**

Someone you choose to manage your plan for you.



### **Reasonable**

Something that is fair and balanced.



### **Registered plan management provider**

An organisation you choose to look after your plan for you.



### **Significant**

Something that is big or major.



### **Specialist assessment**

An exam done by a professional like a doctor or therapist.

## MORE INFORMATION

Phone 1800 800 110  
Website [ndis.gov.au](http://ndis.gov.au)  
Email [enquiries@ndis.gov.au](mailto:enquiries@ndis.gov.au)

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