



NDIS Planning

Getting started with the NDIS

Your first NDIS planning meeting is the start of a lifelong relationship with the NDIS. Your NDIS plan is how much money the NDIS will pay for your support workers, services, and other items you might need. It is important that you receive the right funding to purchase the services you need.

Your NDIS plan will outline the types of funding you have access to, how much funding there is, and what it can be used for. Your Support Coordinator, Local Area Coordinator (LAC) or Early Childhood Early Intervention (ECEI) partner can help you understand this.

Your NDIS plan will also include a copy of your NDIS goals. These are the goals that the NDIS will ask about at your 12-month review meeting. You will have regular reviews with the NDIS, most reviews are at 12 or 24 months (1 or 2 years).

About NDIS planners

Your planner will usually be a person from the National Disability Insurance Agency (NDIA) or a Local Area Coordinator (LAC) from a contracted organisation. There are also Early Childhood Early Intervention (ECEI) Planners for young children, these are often at the same offices at NDIA or LAC planners, but could also be at maternal, childhood, or family health centres.

All of the planners have a very similar role in planning, they will meet with you to discuss your needs, and write up your plan. All plans are then sent to a delegate for approval. The NDIA delegate has the final say on what is and isn't funded in your plan. Sometimes if you have an NDIA planner, they will also be the delegate.

LAC and ECEI partners will also be your liaison to help connect with services if you do not have a Support Coordinator funded in your plan. The person who writes your plan is often your liaison however this can change while your plan is being approved or during your plan.



What happens in a planning meeting?

Each planning meeting is different, and every planner runs the meetings differently. There are a few things that are typically in NDIS planning meetings:

- **Assessment**
 - ▶ The planner will ask you a range of questions about your life and disability. The questions ask you to rate how easy or hard each item is to do, or how much they impact your life.
 - ▶ The assessment will show the planner how much support the NDIS will be able to fund in your NDIS plan.
- **Health Professionals**
 - ▶ You will talk with the planner about any recommendations that health professionals and specialists have made for you. They will consider these when making your NDIS plan.
- **Goal Setting**
 - ▶ You will tell the planner your NDIS plan goals. These may not be your big life goals, but goals that you hope to achieve within the next few years with NDIS funding.
 - ▶ Every support you are asking for in your NDIS plan will need to be connected to an NDIS goal.

There are many reasons why a person may not use all of the funding in their NDIS plan. These include long waitlists for health therapists, or if you are sick and are not having your regular supports.

This is OK and doesn't mean you will get less money in your next plan. When you have your annual Plan Review, make sure that you tell your planner why you have some unspent money in your NDIS plan.

How do I know if my planner understands my needs?

You are the expert in your life. The planner will only know and understand what you tell them or show them.

You should ask your planner to repeat back anything important you have said, and confirm how they have understood it. This is a good way to know whether they understand how your disability impacts your life, and how the supports you are asking for can help you. If you are using an interpreter in your planning meeting, this is an important step.



IMPORTANT TIP

This is YOUR planning meeting.

If a topic has not been discussed, you can introduce it..

If you feel uncomfortable with your planner, or that your planner does not understand you, you can stop your planning meeting and ask for a new planner.

Your rights and entitlements

- You have the right to an interpreter in your NDIS planning meeting to make sure that you and the planner have understood each other
- You are entitled to bring anyone you choose with you to your planning meeting.
- You are entitled to have your plan translated into your language
- You are entitled to change or postpone your meeting to a time that is suitable for you
- You are entitled to a face to face meeting with your planner
- The planner must keep any documentation you give them on file as evidence of your planning meeting



Independent Assessments

The NDIA may ask you to participate in an independent assessment. The assessment will determine how much funding will be in your NDIA plan, based on your support need. The assessor will be an allied health professional (e.g. OT, Physiotherapist, Social Worker) that has not worked with you before. The assessors are not employees of the NDIA. They work independently. The NDIA has developed this assessment to make sure everyone in the NDIS have an assessment of their needs, even if they cannot afford it themselves. The NDIA pays for the independent assessment.

How you can (and can't) use your NDIS plan

- ✓ Pay for support workers that will help you to live your life at home and in the community.
- ✓ Pay for items to help you communicate or move about your community
- ✓ Help you to think about your life goals
- ✗ Find suitable support workers quickly. You may need to try a few support workers before you find one you work well with.
- ✗ Guarantee that you will get any support or service within a certain time period
- ✗ Provide a full person-centred plan that considers all aspects of your life

Steps for your NDIS planning meeting

↓ START HERE

1 Write down what you do and don't like about your current NDIS plan. If you do not have a plan yet, write about your life.

2 Write down the types of supports you need but are not getting yet. It can be helpful to ask family, friends, and support workers/services who see you often. They might think of things you haven't noticed.

3 Find any reports or assessments you have that are about your disability.

4 Talk to the health professionals you see, and ask for a recommendation for support funding (e.g. your doctor/GP, your Occupational Therapist etc)

5 If you want to, ask people close to you (e.g. family, friends, support worker that you have known for a long time) if they want to come to your planning meeting.

6 Organise your planning meeting with your NDIA planner, LAC, or ECEI partner. Make sure to tell the planner if you, or someone coming with you needs an interpreter so that they can organise this.

7 Bring all of the notes and letters of recommendation you have collected to your planning meeting.

8 Talk about your life, and what you think is missing. Remember to tell the planner how these relate to your disability. Remember that you need to tell the planner what things are like when your disability is impacting your life a lot.

9 Ask the planner to repeat your goals and requested supports back to you, to make sure that they have understood. Make sure that you write down your planner's name, and what organisation they work for.

What if I am not happy with my NDIS plan?

If you are not happy with your NDIS plan, and think something has been missed, or that you did not get enough funding for a need you have, there are a few steps that can be taken:

1. Contact your NDIA Planner or LAC/ECEI. If you notice that something is wrong, sometimes they can make a small change quickly.
2. Internal Review of a Decision. In the first 3 months of your NDIS plan, you can explain to the NDIS why you think they made the wrong decision, and they will review this. You can do this by:

☎ **Calling:** 1800 800 110

✉ **Emailing:** enquiries@ndis.gov.au

✍ **Writing a letter to the NDIA:** Chief Executive Officer, National Disability Insurance Agency, GPO Box 700, Canberra ACT 2601



3. Administrative Appeals Tribunal (AAT) review. The AAT is an external independent tribunal. If you are not happy with the internal review decision, you can apply for the AAT to have a look at the decision. The review could be through phone conversations, a meeting with you and the NDIA, or a formal hearing. You need to apply for this review within 28 days of the internal review decision.



You can do this by filling in an application form online, or printing this out and posting it to the AAT.

More information about the AAT, and a video about applying for a review can be found on the AAT website.

www.aat.gov.au/apply-for-a-review/national-disability-insurance-scheme-ndis



Disability Advocacy Resource Unit (DARU) 2016, National Disability Insurance Scheme (NDIS) Internal Review (Review of a reviewable decision) and NDIS Appeals Flow Chart. www.daru.org.au/wp/wp-content/uploads/2016/04/NDIS-Appeals-Flowchart-Final.pdf

How to make a complaint if required

If you are not happy with your planner and would like to make a complaint, you can discuss this with their manager, or a complaints manager for the organisation.

If you are not happy with this resolution, you can make a complaint directly to the NDIA's complaints department.

You can contact the NDIA directly if you want to make a complaint about your NDIA planner, LAC or ECEI partner, or if you have a complaint about the planning process.

You will need to use the feedback and complaints form if you want to make a complaint to the NDIA.

You can contact them on:

☎ 1800 800 110 ✉ feedback@ndis.gov.au

🖥 www.ndis.gov.au/contact/feedback-and-complaints

✍ National Disability Insurance Agency, GPO Box 700, Canberra ACT 2601



If you are not happy with how the NDIA has responded to a complaint you have made or a decision made in an internal review, you can contact the Commonwealth Ombudsman. The Ombudsman will ask for your NDIA complaint number.

The Ombudsman has the power to investigate how you have been treated during your interactions with the NDIA, and decisions made in response to your complaints. The Ombudsman cannot investigate decisions made about your NDIS access, NDIS plan, or problems with other services you use.

You can contact them on:

🖥 ombudsman.gov.au

☎ 1300 362 072, or 131 450 if you need an Interpreter



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