



# Using your NDIS plan

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**BOOKLET**

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**This booklet covers:**

- Understanding your plan
- Using your plan
- Reviewing your plan and progress

# How to use this booklet

This booklet will help you understand your NDIS plan and how to use funding, arrange supports and services, and work toward your goals. It will also help you review your goals and prepare for your plan to be reviewed.

Use this booklet when you talk with your Early Childhood Early Intervention (ECEI) Coordinator, Local Area Coordinator (LAC) or the National Disability Insurance Agency (NDIA) about your NDIS plan and how you are progressing toward your goals. You can note things that are working well in your plan and what things might need to change. Also use this booklet to record your questions, notes and ideas.

**NDIS KEY WORDS:** Some words we use to talk about the NDIS might be new to you, so we explain them along the way.

In this booklet, examples of notes or questions are shown in **red text**.

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This is the third and final booklet in the series.

## BOOKLET 1: Understanding the NDIS

### Booklet 1 covers:

- Learning about the NDIS
- Deciding whether to apply for the NDIS
- Accessing the NDIS

## BOOKLET 2: Planning

### Booklet 2 covers:

- Understanding your current supports and preparing for your planning meeting
- Attend a planning meeting to create your plan
- Receive your approved NDIS plan

## BOOKLET 3: Using your NDIS plan

### In Booklet 3:

#### Understanding what's in your plan

- Learn what the different parts of your NDIS plan mean, who can help you start using your plan and how your plan is managed.

#### Learning how to use your plan

- Learn how to start using your plan to achieve your goals.
- Understand what you can spend your funding on, and how to find service providers. It will also tell you how you can access community and other government services outside the NDIS.

#### Choosing and managing supports and services

- Use this booklet to start choosing providers to deliver your supports and services.
- Find out what to do if things aren't working out or you want to try another provider.

#### Reviewing your plan and progress

- Use this booklet to help keep track of your goals.
- Make notes about what is working in your NDIS plan and what might need to change when your plan is reviewed.
- Towards the end of every plan you will need to get ready for your plan review. Start thinking about your goals, and how your plan is helping you to achieve them. You may need to think about the future goals you would like to achieve or community and other government services you may need if you no longer require support from the NDIS.

**You will receive the booklets you need during your NDIS journey, or you can access them on the NDIS website at [www.ndis.gov.au](http://www.ndis.gov.au)**

# Understanding your NDIS plan

My NDIS number:

My plan start date:

/ /

My plan end date:

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## Who can help you to start your plan?

Depending on your situation and support needs, you can be provided with help to start your plan with one of the below.

### Early Childhood Early Intervention (ECEI) Coordinator

Families and carers of children aged 0-6 years who have an NDIS plan will work with an ECEI Coordinator. ECEI Coordinators have experience working with children with disability or developmental delay. The NDIS ECEI approach supports families and carers to help children develop the skills they need to take part in daily activities and reach their developmental milestones.

### Local Area Coordinator (LAC)

Most NDIS participants over seven years of age will have a LAC to help them understand and use their plan. This includes showing participants how to use the myplace portal and connecting them with funded supports. LACs support participants throughout their plans to monitor how the plan is going, and they can check progress regularly.

ECEI Coordinators and LACs come from organisations in your local community, which work with the NDIA to deliver the NDIS. Visit the NDIS website to find ECEI and LAC Partners in your area.

### Support Coordinator

If ECEI or LAC Partners are not available in your area, or you need more help coordinating your supports and services, the NDIA may fund a Support Coordinator in your NDIS plan. A Support Coordinator will help you build the skills you need to use your plan to achieve your goals, live more independently, increase your skills and be included in your community and in employment.

Specialist support coordination is a higher level of support coordination. It is for people whose situations are more complex and who need specialist support.

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“The NDIS has helped me to be more independent, by supporting me with modifications to my new house, helping me get back driving a car. Driving a car has been huge for me. Also, they’ve helped get me back to the gym, which will lead to the ultimate goal of being able to walk a lot more and not have to rely on the chair as much as what I do.”

**ROY, NDIS PARTICIPANT**



## How your ECEI Coordinator, LAC or Support Coordinator can help you use your plan

Your ECEI Coordinator, LAC or Support Coordinator will help you start your NDIS plan.

They can help you:

- Understand your plan and what supports and services you can pay for with your NDIS funding.
- Learn what supports and services are the responsibility of other services, such as the health or education systems, or your state or territory government.
- Connect with community and other government services.
- Find providers who meet your needs and will help you achieve your goals.
- Put service agreements and bookings in place with your providers.
- As a point of contact if you have questions, concerns or something in your life changes.

### Your ECEI Coordinator, LAC or Support Coordinator's contact details

**Name:**

**Phone number:**

**Email address:**

**Office address or location:**

## Viewing your plan

Your plan will be available on the NDIS myplace portal about 24 hours after it has been approved. You will also receive a printed copy of your plan either in person or in the mail in your preferred format or language.

## What is myplace?

myplace is a secure website portal on the Australian Government's MyGov website where you or a person you trust (a nominee or child representative) can access your NDIS information. If you already have a MyGov account for other government services such as Medicare, the Australian Taxation Office or Centrelink, you can use the same MyGov account for the NDIS.

You will be given an activation code to use the first time you access the myplace portal. It is important that you access myplace as soon as possible after you receive your activation code, as the code will expire within 10 days. If you need an activation code, or your activation code has expired, you can get another one by calling the NDIA on **1800 800 110** or contacting your ECEI Coordinator or LAC.

### What can you do on myplace?

- See your current plan and previous plans.
- Check your contact details.
- See messages from the NDIS.
- Create and view payment requests.
- Create and manage service bookings.
- Upload documents, including assessments or service agreements.
- Share your plan, or parts of your plan, with your service providers.
- Find service providers.

For detailed instructions about using myplace, refer to the **NDIS myplace participant portal: Step-by-step guide** on the NDIS website.

## What's in your plan?

Your NDIS plan will be based on the discussion you have in your planning meeting. Your plan will include the following information:

### Information about you

This section includes basic information about your disability, your day-to-day activities, where you live, who you live with, or who cares for you.

### Family and friends

This section includes information about the support you get from family and friends that is not funded but will help you work toward your goals.

### Services and community groups

This section includes information about services and supports funded and delivered by community or other government services like support groups, health centres, libraries and public transport.

### Your goals

This section includes the current goals you would like to achieve as part of your plan and the long-term goals you have identified for your life. Goal-setting is an important part of the NDIS and each of your supports and services should be helping you achieve the goals you have in your NDIS plan.

### Funded supports

This section tells you what funding you have been allocated in each support category and what this funding is for. You may not have all the support categories funded in your plan. Some people might have one or two support categories funded and others may have more. This will depend on your individual needs and may change from plan to plan based on the supports and services you need.

Your funding is based on what is **reasonable and necessary** for your needs, in addition to the support provided by family, friends and other community and government services that you need to live your life and achieve your goals.

You **must** only use your NDIS funding on supports and services that are related to your disability and will help you to achieve the goals in your NDIS plan.

#### NDIS KEY WORDS:

#### Reasonable and necessary

'Reasonable' means something fair and 'necessary' means something a person needs. The NDIS funds supports and services that relate to a person's disability to help them achieve their goals.

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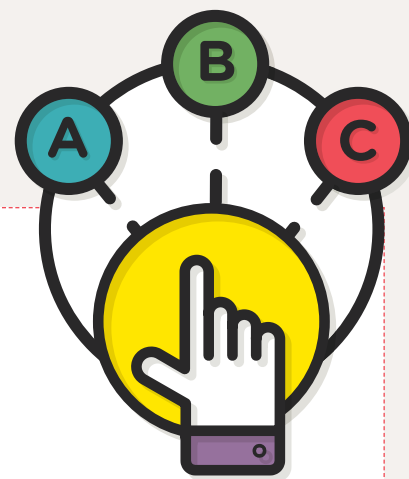
“One of my main supports is my occupational therapist. That's where I try to achieve my goals to become more independent and get jobs and stuff like that. Then I also have my speech pathologist to learn how to communicate more clearly and keep the conversation going”

KIRA, NDIS PARTICIPANT





# Support budgets



There are three types of support budgets that may be funded in your NDIS plan:

- Core Supports budget
- Capacity Building Supports budget
- Capital Supports budget

## Core Supports budget

Core Supports help you with everyday activities, your current disability related needs and to work towards your goals. Your Core Supports budget is the most flexible, and in most cases, you can use your funding across any of the following four support categories. However, there are instances where you do not have flexibility in your funding, particularly for transport funding.

IN YOUR PLAN	IN THE MYPLACE PORTAL	DESCRIPTION
Assistance with Daily Life	Daily Activities	For example, assistance with everyday needs, household cleaning and/or yard maintenance.
Consumables	Consumables	Everyday items you may need. For example, interpreting services, continence products or low-cost assistive technology and equipment to improve your independence and/or mobility.
Assistance with Social & Community Participation	Social, community and civic participation	For example, a support worker to assist you to participate in social and community activities.
Transport	Transport	This is support that helps you travel to work or other places that will help you achieve the goals in your plan.  How you can spend your transport funding and how it is paid to you (whether upfront or in regular payments) will be different for each person. Your LAC or NDIA planner will explain how you can use this budget.

## CASE STUDY

### CHARLOTTE

Charlotte's goals are to learn to be more independent in her daily life and to make friends. She has funding in her Core Supports budget to help her with tasks like getting dressed and cooking meals.

Over time, Charlotte feels confident to reduce the amount of support she needs in the morning to get dressed and make breakfast. Because Charlotte's Core Supports budget is flexible, she decides to reduce the amount of one-on-one support she receives in the morning and uses the funding for support to take part in a group recreational swimming activity once a week.

## Capacity Building Supports budget

Capacity Building Supports help you build your independence and skills to help you reach your long-term goals.

Unlike your Core Supports budget, your Capacity Building Supports budget cannot be moved from one support category to another. Funding can only be used to purchase approved individual supports that fall within that Capacity Building category. The Capacity Building categories are:

IN YOUR PLAN	IN THE MYPLACE PORTAL	DESCRIPTION
<b>Support Coordination</b>	<b>Support Coordination</b>	This is a fixed amount for a Support Coordinator to help you use your plan.
<b>Improved Living Arrangements</b>	<b>CB Home living</b>	Support to help you find and maintain an appropriate place to live.
<b>Increased Social &amp; Community Participation</b>	<b>CB Social Community and Civic Participation</b>	Development and training to increase your skills so you can participate in community, social and recreational activities.
<b>Finding &amp; Keeping a Job</b>	<b>CB Employment</b>	This may include employment-related support, training and assessments that help you find and keep a job, such as the School Leaver Employment Supports (SLES).
<b>Improved Relationships</b>	<b>CB Relationships</b>	This support will help you develop positive behaviours and interact with others.
<b>Improved Health &amp; Wellbeing</b>	<b>CB Health and Wellbeing</b>	Including exercise or diet advice to manage the impact of your disability. The NDIS does not fund gym memberships.
<b>Improved Learning</b>	<b>CB Lifelong Learning</b>	Examples include training, advice and help for you to move from school to further education, such as university or TAFE.
<b>Improved Life Choices</b>	<b>CB Choice and Control</b>	Plan management to help you manage your plan, funding and paying for services.
<b>Improved Daily Living</b>	<b>CB Daily Activity</b>	Assessment, training or therapy to help increase your skills, independence and community participation. These services can be delivered in groups or individually.

## Capital Supports budget

Capital Supports include higher-cost pieces of assistive technology, equipment and home or vehicle modifications, and funding for one-off purchases you may need (including Specialist Disability Accommodation).

It is important to remember that funds within the Capital Supports budget can only be used for their specific purpose and cannot be used to pay for anything else. The Capital Supports budget has two support categories:

IN YOUR PLAN	IN THE MYPLACE PORTAL	DESCRIPTION
<b>Assistive Technology</b>	<b>Assistive Technology</b>	This includes equipment items for mobility, personal care, communication and recreational inclusion such as wheelchairs or vehicle modifications.
<b>Home Modifications</b>	<b>Home Modifications</b>	Home modifications such as installation of a hand rail in a bathroom, or Specialist Disability Accommodation for participants who require special housing because of their disability.

## Other information in your plan

### Stated supports – not flexible

Any services listed as ‘stated supports’ are not flexible. This means funding has been allocated for a specific support or service, and you can’t use this funding for something else. You cannot swap ‘stated supports’ for any other supports.

### In-kind supports – pre-paid

If there are supports in your plan that are listed as ‘in-kind’, it means the service has already been paid for by your state, territory or the Australian government. You must use this provider as they have already received payment and will provide all services that are booked. This means you cannot choose a provider for that service, however if you have a concern about using a specific in-kind provider, you are encouraged to raise your concerns with your ECEI Coordinator, LAC or NDIA planner.

As the NDIS roll out continues across Australia, it is expected that in-kind supports will be phased out and you will have choice and control over the providers you use.

### Quote required

Where a support is listed as ‘quote required’ additional information such as quotes and/or specialist reports will be required before funding can be made available in your plan.

## If you are not happy with your funding

You have the right to ask for an **internal review** of your plan by the NDIA. Your ECEI Coordinator, LAC or the NDIA can explain how to do this and can put you in touch with advocates who can help you with this process.

When the NDIA reviews a participant’s plan it will look at all of the funded supports in the plan, not just one of them. This helps to make sure there are no gaps in the plan. To find out more about requesting a review of your plan, contact your ECEI Coordinator, LAC or the NDIA. If you have asked for a review, you can continue to use your plan while you wait for the decision.

If you’re not happy with the internal review, you can apply for a review by the Administrative Appeals Tribunal (AAT), which exists outside the NDIA. You can’t ask the AAT to review a decision by the NDIA before there has been an internal review by the NDIA.

### NDIS KEY WORDS:

#### Internal review

This is a review of a decision by the NDIA.

The NDIA staff member who works on the internal review will not have been involved in the earlier decision. They may want to talk to you directly as part of this process.

## Managing your NDIS funding

During your planning conversation, you will have talked about how you want to manage the funding in your plan to pay for supports and services. Refer to **Booklet 2 - Planning** for an overview of the different ways your funds can be managed. If you can’t remember how your funds are managed, you will find it listed in your plan or on the myplace portal.

### There are three different ways to manage your plan:

- 1. Self-management** – The NDIA will pay you so you can pay your providers directly.
- 2. Plan-management** – The NDIA will provide funding in your plan to pay for a Plan Manager who pays your providers for you.
- 3. NDIA-managed** – The NDIA will pay your providers on your behalf.

Now you have your plan, you may have more questions about how funding management options work. Your ECEI Coordinator, LAC or the NDIA can answer your questions, help you if there are any problems or work with you if you would like to change how your plan is managed.

Remember, no matter how your funds are managed, you still have choice and control to ensure your services are working for you and fit in your budget.

Even if your funding is managed by the NDIA or a Plan Manager, you should regularly check the myplace portal and your funding to make sure your budgets are on track.



# Using your plan

## What can you spend your funding on?

Consider the following things when deciding what to buy with your NDIS funding:

Question	Yes/No
1. Will the support or service help you to achieve the goals in your NDIS plan?	
2. Is the cost of the support or service reasonably priced and is it best value for money compared to other supports?	
3. Can you afford the support or service within your approved NDIS budget? Remember, your funding needs to last the entire period of your plan.	
4. Will the support or service help you to improve how you connect to your local community and improve the relationships you have with family and friends? It should not replace supports that would usually be provided by family, friends and within your community.	
5. Is the support or service something that should be funded by other government services instead? For example, dental, health or hospital services, education, housing and public transport are all provided through other government services. Remember, all communities should have facilities and activities that are inclusive and accessible to people with disability.	
6. Will the support or service help you to participate in activities with friends and other members of your community, or help you to find or keep a job?	
7. Is it safe? Your supports and services should not cause you any harm or put other people at risk.	

## Who can you buy services from?

You have choice and control about what supports and services you need to achieve your goals, where and when they are provided and by whom. Some participants ask families or friends to help them make these decisions, while others may ask their ECEI Coordinator, LAC, or Support Coordinator for help.

## What is a service provider?

A service provider is a person, business or organisation that delivers funded services. Service providers have different areas of experience and expertise so it's important to work out what you want and find the right providers for you. Providers can include large companies, charities, small not-for-profits, sole traders, or any other type of business.

Providers that are registered are called 'NDIS registered providers' and meet government quality and safety standards.

If your NDIS funding is NDIA-managed you can only use NDIS registered providers to deliver your services. If you have been working with a support worker or provider for a number of years who is not an NDIS registered provider, encourage them to register so that you can continue to work with them using your NDIS funding.

Participants whose NDIS funds are self-managed or managed by a Plan Manager can use NDIS registered providers and non-registered providers.

## Choosing and managing your services

### How do you find service providers?

Once you've identified the types of services that may help you achieve your goals, it's time to find out more about the providers in your area and whether they are right for you. Your ECEI Coordinator, LAC or Support Coordinator can also help you. To find NDIS registered providers you can search the Provider Finder on the myplace portal.

You might want to research providers on the internet, check reviews, get advice from friends or family and speak with different providers either face-to-face or over the phone before you agree to work with them.

### If you can't find any service providers in your area

Because the NDIS is new, it may take time for new service providers to open in your area, particularly in rural or remote towns. If there are not many service providers where you live, you can also think about other people or businesses in your area that might be able to support you.

If you have difficulty finding service providers, your ECEI Coordinator or LAC will be able to help or your NDIS plan might include Support Coordination funding to help you to find services that will help you achieve your goals.

### How do you choose providers to deliver your services?

You may already have used some service providers before you joined the NDIS and you may choose to work with them again. You may also want to try new providers when you become an NDIS participant.

When considering a service provider, talk to them about your goals and discuss how they can help you work toward them. Here are some questions you may ask:

- Are you an NDIS registered provider?
- How will you help me achieve my goals?
- How much does your service cost?
- Can I choose which staff will work with me?
- Can you provide the service at a time that suits me?
- How can I make a complaint or resolve a payment issue?

### Sharing your plan

You do not have to give anyone a copy of your NDIS plan. Sharing your plan is your choice.

You can choose to share parts or all of your plan with your service providers through the myplace portal. In particular you may want to share information about you and your goals, so they know what you want to achieve and how you would like them to assist you.

NDIS registered providers must follow privacy rules and should not share your personal information with anyone else without your permission. If you have concerns about your privacy, speak to your provider about their privacy policy and rules.

## CASE STUDY

### AHMAD

**Ahmad lives in a rural town and is using a Plan Manager to manage his NDIS funding. Ahmad requires support to get out of bed, shower and get ready for the day.**

There are no disability support organisations in his town, but Ahmad knows of a local woman, Brenda, who has her own business supporting elderly people. Although she is not an NDIS registered provider, Brenda has the right skills to help Ahmad and he feels comfortable with her. Ahmad and Brenda agree that she will be able to provide two hours of support to Ahmad each morning.

Ahmad's Plan Manager creates a written service agreement with Brenda to outline the support Ahmad needs to achieve his goals, the hourly rate Ahmad will pay, when the service will be delivered, and the payment terms.

## Finding the right provider for you

Use the space below to note the providers who you might like to work with.

My goal	Support needed	What are you looking for in a service provider?	Who could provide this service to you?
E.g. I want to get a job when I finish school.	I want help to learn how to manage my time, build confidence and prepare applications and for interviews.	Someone who has experience working with people like me. I would like to work with a provider that is easy to access from public transport.	ABC Recruitment

## Making a service agreement

Once you have chosen your providers you need to agree on how your supports and services will be provided and paid for in a written agreement. This is called a service agreement.

Having an agreement in writing makes it clear what will be provided to you and is useful in case you have an issue that needs to be discussed.

You are encouraged to have a service agreement in place with each of your providers.

Services agreements might include information such as:

- What support or service the provider agrees to provide.
- The cost of the support or service.
- How, when and where you would like your support or service to be provided.
- How long you need the support or service to be provided.
- When and how your service agreement will be reviewed.
- How any problems or issues that may arise will be handled.
- Your responsibilities under the service agreement – such as letting your provider know if you can't make an appointment.
- The provider's cancellation policy.
- Your provider's responsibilities – such as working with you to deliver your support or service in the right way.
- How you or your provider may change or end the service agreement.

Your provider may have their own standard service agreement that you may like to use, or you can create your own.

Make sure you or your **nominee** read the service agreement carefully before you sign it and keep a copy in a safe place.

## Pricing

The NDIA currently sets the maximum prices that registered NDIS providers can charge for their services in the NDIS Price Guide. The Price Guide can be found on the NDIS website at [www.ndis.gov.au](http://www.ndis.gov.au).

NDIS registered providers can charge less than the listed price but cannot charge more than the maximum price, except for self-managed participants who may choose to pay more.

You can negotiate the price you will pay for a service with your provider and it should be agreed and recorded in your service agreement. The NDIA updates prices on 1 July each year and publishes them on the NDIS website.

If you self-manage your NDIS funds, you can negotiate the cost of the agreed service with your providers.

For funds managed through the NDIA or a Plan Manager, NDIS registered providers cannot exceed the NDIS price guide.

### NDIS KEY WORDS:

#### Nominee

Someone who represents an NDIS participant. They are legally authorised to act and make decisions on their behalf.

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“I am much happier at home, I am practising talking and walking, I am optimistic everything will fall into place. I like having the choice to do what I want when I want; I want to be independent, to have my old life back again.”

**KIRBY, NDIS PARTICIPANT**



## Starting your supports and services

Once you have worked out the supports and services you need and have chosen who will provide them, the final step is setting up a service booking for your NDIS registered providers. This step isn't needed if you are using unregistered providers or self-managing funds.

### Service bookings for NDIS registered providers

Service bookings are used to set aside funding for an NDIS registered provider for a support or service they will deliver. Service bookings are not the same as service agreements. Providers claim payments against the service booking in the myplace portal. A service booking will show the type of support to be provided, the length of time it is needed, and sets aside funding to pay for the support or service. Service bookings can be made by you, your nominee or NDIS registered provider in the myplace portal.

#### **If your NDIS funds are self-managed**

You don't need to use service bookings because you pay your providers directly.

#### **If your NDIS funds are plan-managed**

Your Plan Manager will make one service booking on myplace, which allows the Plan Manager to claim payment from the NDIS for all services and supports by providers in your plan. In this case, both NDIS registered and unregistered providers can be included in the service booking.

#### **If your NDIS funds are NDIA-managed**

You will need to give your NDIS registered service providers your NDIS number and the relevant support areas you have been funded for, so your providers can receive payment. You need to have service bookings in place so your provider can claim payment through the myplace portal.

### Changing a service booking

A service booking can only be changed on the myplace portal before the end date of the service booking.

### Cancelling a service booking

You can end a service booking on the myplace portal before the end date of the service booking. When the service booking is cancelled, any unspent money allocated for that service will be refunded back to your budget.

## Paying for your services

Services are paid through the myplace portal. The process is different depending on how your funding is managed.

#### **If your NDIS funds are self-managed**

As a self-managed participant you have specific roles and responsibilities when you pay for your services. There are two options to pay your service providers using your NDIS funds:

- 1.** You can negotiate with providers to pay their invoices usually within 7-30 days (this might be in a service agreement). Once you receive an invoice you can make a payment request via the myplace portal to transfer the money from your NDIS funding into your nominated bank account.
- 2.** You can pay a service provider first and then make a payment request via the myplace portal to transfer the money from your NDIS funding into your nominated bank account so you are reimbursed.

You will need to keep records of your payments.

More information about paying for services as a self-managed participant can be found in the **NDIS Guide to Self-Management**.

#### **If your NDIS funds are plan managed**

Your Plan Manager will pay your services for you and will keep records of your payments.

#### **If your NDIS funds are NDIA-managed**

Your NDIS registered providers will claim payments through the service booking on the myplace portal. To do this, your provider will need your NDIS number.



## Keeping track of your plan

You should check often to see how much NDIS funding you have left. You can check on the myplace portal in 'My Support Budget' to see how much funding you have spent, and how much you have left.

To ensure you know what you are spending your NDIS funding on, keep a record of the services you receive or ask your provider to give you copies of their service records on a regular basis. Remember, your funding will need to last for the entire period of your plan.

If you are self-managing your NDIS plan, you need to keep all the invoices and receipts as well as bank statements from your nominated bank account for five years. The NDIA can ask to check your records at any time so it is important to keep them organised so you can show that you have spent your NDIS funds on supports that are helping you achieve the goals in your plan. Read more about your responsibilities as a self-manager in the **NDIS Guide to Self-Management**.

Service providers should not claim for services they have not provided. If this happens, contact your provider and try solving the issue with them directly. If you are unhappy with the outcome, contact your ECEI Coordinator, LAC, Support Coordinator or the NDIA.

If you haven't used all your funding at the end of your plan, it will not:

- 'roll over' into your next plan, or
- be 'taken away' in your next plan.

Any changes to your future NDIS plans will be based on what is reasonable and necessary for your needs, taking into account the goals you have achieved so far and how your skills and independence have improved.

## What do I do if I'm unhappy with the support or service I'm receiving?

If you're unhappy with the support or service you are receiving, you may wish to talk to your provider first. You can ask someone you trust, or an independent advocate, to help you. If your issue is not resolved, speak to your ECEI Coordinator, LAC, Support Coordinator or the NDIA.

You can change providers if you're still unhappy, if you no longer require their services or if there's another provider you'd prefer to work with.

In most cases when you change or stop working with a provider, you will need to agree when you will finish with them, which should be in your service agreement.

## What do I do if something changes during my plan?

It is important to tell your ECEI Coordinator, LAC, Support Coordinator or the NDIA about any big event or change in circumstances that may affect your plan, such as:

- changes to your disability needs
- significant changes in your care or support provided by family or friends
- changes to your living arrangements such as where you live, if you live with new people, if you move overseas or into an aged care or residential facility
- changes to your job or that you're looking for a job, or
- if you receive or claim compensation for an accident or illness related to your disability.

A change of circumstances does not necessarily mean your plan will be reviewed or changed, however it's important to let your ECEI Coordinator, LAC, Support Coordinator or the NDIA know about important changes in your life so that your plan meets your current needs.

If something does change for you that affects your needs or the supports in your plan, you need to complete a change of circumstances form, available on the NDIS website or by calling the NDIA.

# Reviewing your plan and goals

## Plan review for NDIS participants

You will be contacted before your plan ends to discuss a review of your plan.

The review of your plan will be conducted face-to-face or over the phone, depending on what you prefer. You can include a family member, friend, advocate or another person in the review of your plan. The review of your first NDIS plan will generally take place 12 months after you start your plan. For future plans, you may be offered a plan that lasts up to 24 months, if your needs are less likely to change.

## Plan review for children

The aim of early intervention is to reduce the impact of a person's disability or developmental delay on their daily life by providing support as early as possible. If your child receives support through Early Childhood Early Intervention (ECEI), their review will usually be with your child's ECEI Coordinator.

Your child's access to the NDIS will be assessed at each plan review. The timing of their review will depend on your child's needs. This is to check that ECEI supports are effective and supporting your child. If your child's development has improved and they have achieved their goals, they may no longer need support from the NDIS.

Before your child turns seven years old, your ECEI Coordinator will also consider what your child might need in the future. If they have not previously had an NDIS plan, the ECEI Coordinator will consider whether they might be eligible to become an NDIS participant to get an NDIS plan.

## Other information you need for your plan review meeting

You may need to provide assessments or reports from some of your service providers for your plan review meeting. This is to show how your supports and services are helping you to achieve your goals. These reports can also make recommendations for supports and services you might need in the future. Your ECEI Coordinator, LAC or the NDIA will discuss this with you.

## Reports I need to provide

**E.g. Progress report from my occupational therapist.**

## Preparing for your plan review

Reviewing your plan is an opportunity to check that your supports and services are helping you to achieve your goals. It's important that your NDIS plan and funding continue to work well for you and are adjusted as your life and goals change.

### Think about:

- What worked well in your plan.
- What didn't work well.
- Have you achieved your goals or made progress towards achieving them.
- Which goals you need to continue to work on and which goals you need to change.
- Who can help you achieve your goals.
- Will you need NDIS support in the future.
- Would you like to change how all or some of your plan funding is managed.

You do not need to pick new goals at each plan review, but your plan, supports and services should be helping you make progress, achieve new things and eventually, achieve your long-term goals.

## Your plan may change over time

As described in **Booklet 1 – Understanding the NDIS**, the NDIS is designed to increase a person's skills and independence so they can live a better life. As you work towards and achieve your goals, the amount of support you need will likely change.

If a service, early intervention support or assistive technology has increased your independence and decreased your need for additional support, you may need less funding, or no longer need any funding through an NDIS plan.

This means you may not need NDIS funding now, but you can contact us again in the future if you need to.

People who have an episodic disability (a disability where the impact on your day-to-day life fluctuates) may also see their NDIS funding levels change over time, just as their disability changes over time.

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“The best thing about the NDIS for me is the difference that it allows me to make in the life of a child, and their family.”

**JOANNA BUTTFIELD,  
NDIS REGISTERED PROVIDER**



## Things to discuss in your plan review

**What worked well in your plan? What goals did you achieve?**

E.g. I got support to do things around the house like washing, drying and help with having a shower.

E.g. I completed my work readiness training and now I'm ready to look for a job.

**What didn't work as well?**

E.g. I feel I need more support to find a job. Finding a job is a long-term goal in my plan.

E.g. My provider keeps changing the staff member who supports me.

**What questions do you have about how your plan is managed? Would you like to change how you manage your funding?**

**E.g. I think I could manage part of my plan, but not all of it. I'd like to discuss this at my next plan review.**

**What are your new goals for your next plan?**

**E.g. I want to become independent and eventually get back to work.**



## Your notes and questions

E.g. My son would like to start playing sport but I'm not sure what is going to be appropriate for him and his disability. What are the options in the area?

E.g. How do I share my plan with providers?

1

2

3

## What happens next?



You have met access requirements for funding through the NDIS.



You have an approved NDIS plan and understand what you can spend your funding on.



You have chosen the right providers for you and know what to do if things aren't working the way they should.



You know what community and other government services are available and, if needed, your LAC or Support Coordinator is connecting you to other services.

Contact your ECEI Coordinator, LAC or Support Coordinator if you have questions, if your circumstances change or if there is anything else you'd like to discuss.

You will be contacted when it is time to review your plan. Complete and bring this booklet to your plan review meeting.

For more information about this booklet, please contact:

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


National Disability Insurance Agency

 Telephone 1800 800 110

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For people who need help with English

 TIS: 131 450

For people with hearing or speech loss

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