

# Using your NDIS Plan

Booklet 3 of 3

This booklet covers:

- what your plan includes
- how to use your plan
- how to choose and pay for supports and services
- how to prepare for a plan reassessment.

## How to use this booklet

You've received your NDIS plan and your budget has been allocated. Now what?

This booklet will help you understand how to use your NDIS funding, arrange supports, and work towards building your skills and independence.

This booklet will also help you prepare for your plan reassessment, which happens as we near the end of your plan.

You can use this booklet to record your questions, notes and ideas.

This is the third of **three** booklets in the series.

### **Booklet 1: Applying for the NDIS**

- What the NDIS does and who is involved
- Whether you may be eligible to join
- How to apply to join NDIS
- The types of things the NDIS funds

### **Booklet 2: Creating your NDIS Plan**

- Getting ready for your planning conversation
- Creating your NDIS plan
- Receiving your approved NDIS plan

### **Booklet 3: Using your NDIS plan**

- What your plan includes
- How to use your plan
- How to choose and pay for supports and services
- How to prepare for your plan reassessment

These booklets are available in different formats and languages other than English. Visit the [NDIS website](#) or call **1800 800 110** to request a copy.

## How to start your NDIS plan

Once your plan is approved, we'll ask if you want to meet and talk about how to use your plan. We call this an implementation meeting. If you want to have this meeting, we'll arrange it within 28 days after we approve your plan.

Your [early childhood partner](#), [local area coordinator](#), NDIA planner, [support coordinator](#) or [recovery coach](#) can help you start using your plan.

For example, they can help you:

- understand your plan, and what supports you can buy with your funding
- understand what supports other government services, such as health or education systems, can provide for you
- connect you with your community and other government services in your local area
- find providers that meet your needs and will help you pursue your goals
- use the [myplace portal](#) and [my NDIS app](#)
- make [service agreements](#) and [service bookings](#) with your providers
- answer any questions or concerns you have
- ask for a change to your plan if something in your life changes.

If you need help coordinating your supports, we may have included funding for a [support coordinator](#) in your plan. A support coordinator can help you to make the best use of the supports in your plan.

You can connect with support coordinators by using a request for service. The request for service includes information about your goals, needs and circumstances. Your [early childhood partner](#), [local area coordinator](#) or NDIA planner can help you to find support coordination providers. Visit the [NDIS website](#) for more information on support coordination.

If you [self-manage](#) your funding, you'll need to give us bank account details before you can claim any funding.

For more information on how to start using your NDIS plan refer to [Our Guideline: Your plan](#).

You can record your early childhood partner, local area coordinator, support coordinator or recovery coach's contact details here:

<b>Name:</b>	
<b>Phone number:</b>	
<b>Email address:</b>	
<b>Office address:</b>	

## Viewing your plan

We'll send you a copy of your plan in your preferred format within 7 days after we approve it.

You can also find your plan in the [myplace participant portal](#) and the [my NDIS app](#).

The myplace portal is a secure website portal on the Australian Government's myGov website where you, or a person you trust (a nominee or third-party decision maker), 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.

We will send you an activation code to use the first time you access the myplace portal. Make sure you log into myplace as soon as possible after you receive your activation code, as the code will expire after 10 days.

If you need an activation code, or your activation code has expired, call us on **1800 800 110** or contact your early childhood partner or local area coordinator to get a new one.

## What can you do on myplace?

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

## What can you do on the my NDIS app?

- make and manage your claims
- view your budget

- view your plan information and personal details

You can download the my NDIS app from the Google Play Store and Apple App Store for free:

- [Get it on Google Play](#)
- [Download it from the Apple App Store](#)

## **What's in your plan?**

Your NDIS plan will be based on the discussion you had in your planning conversation. Your plan includes five main sections:

### **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 to help you work towards 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 pursue and the long-term goals you have identified. Goal setting is an important part of building a personalised plan for you.

The supports we fund should help you pursue your goals.

### **Funded supports**

This section tells you what funding you have been allocated across three types of support budget: core supports, capital supports and capacity building supports. These budgets are described in the How your funding is structured section of this booklet.

Within the support budgets, there are 15 different support categories that may be funded. 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.

Reasonable and necessary supports are the supports we fund in your plan to meet your disability support needs. You can use this funding to pay for supports from [service providers](#).

The Australian Government made laws about what we can fund under the NDIS. All supports we fund in a plan need to meet the criteria set out in these laws. We call these the [NDIS funding criteria](#).

To meet the NDIS funding criteria, a support must:

- meet the NDIS [reasonable and necessary criteria](#)
- not be a [type of support the law says we can't fund or provide](#).

You must only use your NDIS funding on supports that are directly related to your disability. More information about the type of supports the NDIS may fund is available in the [NDIS Pricing Arrangements and Price Limits](#).

## How your funding is structured

Your supports will be divided into 3 different budgets:

- Core supports – supports for everyday activities
- Capacity building supports – supports to help you build your skills and increase your independence
- Capital supports – supports such as assistive technology, vehicle modifications, home modifications and Specialist Disability Accommodation.

Each budget is divided into a number of support categories. Support categories have more detail about what supports you can buy with your funding. When your funding is flexible, you can usually choose what supports you buy within the [support budgets and support categories in your plan](#).

QUOTE FROM KIRA, NDIS PARTICIPANT

**'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.'**

## Core supports budget

Core supports help you with everyday activities, your current disability-related needs and to work towards your goals. Your core supports is the most flexible budget, and, in most cases, you can use funding from one category across any of the other categories:

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, 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	<p>This is support that helps you travel to work or other places that will help you pursue the goals in your plan.</p> <p>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 will explain how you can use this budget.</p>

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## Capacity building supports budget

Capacity building supports help build your independence and skills and increase your independence as you pursue your goals.

Unlike your core supports budget, funds from your capacity building support budget cannot be moved from one support category to another. Funding can only be used to purchase approved individual supports within that specific capacity building (CB) category.

In your plan	In the myplace portal	Description
Support Coordination	Support Coordination	This is a fixed amount for a Support Coordinator to help you use your plan.
Improved Living Arrangement	CB Home Living	Support to help you find and maintain an appropriate place to live.
Increased Social & Community Participation	CB Social Community and Civic Participation	Development and training to increase your skills so you can participate in community, social and recreational activities.
Finding & Keeping a Job	CB Employment	This may include employment-related support, training and assessments that help you find and keep a job, such as the school leaver employment supports.
Improved Relationships	CB Relationships	This support will help you develop positive behaviours and interact with others.
Improved Health & Wellbeing	CB Health and Wellbeing	Including exercise or diet advice to manage the impact of your disability. The NDIS does not fund gym memberships.
Improved Learning	CB Lifelong Learning	Examples include training, advice and help for you to move from school to further education, such as university or TAFE.
Improved Life Choices	CB Choice and Control	Plan management to help you manage your plan, funding and paying for services.
Improved Daily Living	CB Daily Activity	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, assistive technology and home modifications.

In your plan	In the myplace portal	Description
Assistive Technology	Assistive Technology	This includes equipment items for mobility, personal care, communication and recreational inclusion such as wheelchairs or vehicle modifications.
Home Modifications	Home Modifications	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.

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### QUOTE FROM ROY, NDIS PARTICIPANT

**'The NDIS has helped me to be more independent, by supporting me with modifications to my new house and helping me get back to 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.'**

## Other information in your plan

### Stated supports – not flexible

Some supports in your plan may be included as stated supports. This means the funding has been allocated for a specific service, or product 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 federal government.

When you use an in-kind service, the existing provider will deliver your in-kind supports and you will not need to pay from them with your NDIS plan funds. If you have a concern about using a specific in-kind provider or service, you can talk to your early childhood partner, local area coordinator or NDIA planner.

### Quote required

Where a support is listed as quote required, you will need to provide us with additional information such as quotes and/or specialist reports before funding can be made available in your plan. You can share this information with your NDIA planner, early childhood partner, local area coordinator or support coordinator.

### Language interpreting supports (non-disability related)

Where English is not your preferred language, your registered NDIS provider will arrange an interpreter on your behalf, to help you to use the supports in your plan. You don't need to pay for this from your NDIS plan.

If you need an interpreter due to the impact of your disability, for example hearing loss, funding for reasonable and necessary interpreting supports will be included in your NDIS plan.

### Changing your plan

You can make changes to your goals or the information about you in your plan at any time.

You can [contact us](#) to ask us to update your goals and information about you.

When you ask us to update your goals or the information about you, we'll replace your plan with a new one and give you a copy of your new plan within 7 days.

If you need help, your early childhood partner, local area coordinator or NDIA planner can explain how to request changes to your plan.

## If you disagree with your plan

If you're not happy with your current plan, you should talk to your early childhood partner, local area coordinator, support coordinator, recovery coach, or planner.

They may be able to explain our decisions, clarify how you can use the funding, or help you fix any problems. It's a good idea to do this soon after you get your plan.

We can also give you written reasons on why we made the decision. [Contact us](#) if you'd like reasons for our decision.

If you don't agree with our decision to approve your plan, you have 3 months to ask for an [internal review](#). If you ask us after 3 months, we'll let you know what other options you have.

Having an internal review means someone who wasn't involved in creating your plan will review our decision to approve your plan. They'll consider if we made the right decision under the laws for the NDIS.

If you have asked for a review, you can continue to use your plan while you wait for the decision. We'll complete the review within 60 days.

If you still don't agree with our decision after the internal review, you can ask the Administrative Appeals Tribunal to review our decision. We call this an external review.

Learn more about [reviewing our decisions](#) on the NDIS website.

## Managing your NDIS funding

In your planning conversation you will have talked about how you want to manage the funding in your plan. In short, this is about who and how you pay the providers of your supports and services.

Your plan lists how you have chosen to manage your funding. You can also ask your local area coordinator, early childhood partner, support coordinator or the NDIA if you want to confirm this.

As we mentioned in [Booklet 2 – Creating your NDIS Plan](#), there are three ways you can manage the funding in your plan:

1. **Self-managed** – We will pay you so you can pay your providers directly. To find out more about self-management see the [Guide to Self-Management](#) on the NDIS website.
2. **Using a plan manager** – We will provide funding in your plan to pay for a plan manager who pays providers on your behalf.

3. **NDIA-managed** – We will pay your providers on your behalf.

You may also have chosen a **combination** of the above options. For example, you might manage some of the funding yourself, and the NDIA manages the rest.

Now that you have your plan, you may have more questions about how your funding is managed, or you might want to change how you manage your plan funding. If this is the case, let your early childhood partner, local area coordinator, support coordinator or the NDIA know.

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](#) or [my NDIS app](#) to make sure your budgets are on track.

**QUOTE FROM KIRBY, NDIS PARTICIPANT**

**'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.'**

## Using your plan

### What can you spend your funding on?

When deciding what to buy with your NDIS funding, consider the following things:

Question	Yes/No
1. Will the support help you to pursue the goals in your NDIS plan?	
2. Is the cost of the support reasonably priced and is it the best value for money compared to other supports?	
3. Can you afford the support within your approved NDIS budget? Remember, your funding needs to last the entire period of your plan.	
4. Will the support help you find or keep your job, help with your education, 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 something that should be funded by other government services instead? For example, dental, health or hospital services, education, housing and public transport.	

Question	Yes/No
<p>Note: the NDIS will fund some supports, such as disability-related health services, where they are part of the participant's daily life and result directly from the participant's disability. Remember, all communities should have facilities and activities that are inclusive and accessible to people with disability.</p>	
<p>6. Will the support help you to participate in activities with friends and other members of your community, or help you to find or keep a job?</p>	

If you answer yes to all these questions, the support is likely to be a good use of your funding, but the decision is yours.

If you answer no to any of these questions, you may like to look at other support options.

## Choosing and managing your supports

It's your choice who you pay for supports and how you use your funding to pursue your goals. Some participants ask family or friends to help them make these funding decisions, while others ask their early childhood partner, local area coordinator, or support coordinator for help.

### What is a service provider?

A service provider is a person, business or organisation you can use to help pursue your goals.

Service providers have different areas of experience and expertise. It's important to find the right providers to meet your needs.

Providers can include large companies, charities, small not-for-profits, sole traders, or any other type of business.

Some providers are registered with the NDIS Quality and Safeguards Commission. This means they meet strict conditions for the quality and safety of their services and must meet the NDIS Code of Conduct. We call them 'NDIS registered providers'.

If a provider isn't registered with the NDIS Quality and Safeguards Commission, we call them an 'unregistered provider'.

If you're self-managing your funding, or using a plan manager, you can use registered or unregistered providers.

If your funding is NDIA-managed, you can only use registered providers to deliver your services.

Learn more about the [NDIS Quality and Safeguards Commission](https://www.ndiscommission.gov.au) on their website, [ndiscommission.gov.au](https://www.ndiscommission.gov.au).

## **How do you find service providers?**

Once you've identified the types of services you want, it's time to find out more about the providers in your area and whether they are right for you.

To find NDIS registered providers you can search the [Provider Finder](#) on the [myplace portal](#) or on the NDIS website.

You might want to research providers on the internet, check reviews and get advice from friends or family. You can also 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**

If you're finding it difficult to find service providers in your area, talk to your NDIA planner, early childhood partner, local area coordinator, support coordinator, or recovery coach. They may be able to help you find services in your area, or work out other options for your situation.

You may be able to get some support over the phone or internet, for example therapy through [telehealth](#).

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

You may have already used some service providers before you joined the NDIS and you can choose to work with them again. You may also want to try new providers or change to a different provider after you have started using your NDIS plan.

When considering a service provider, here are some questions you may like to ask:

- Are you a NDIS registered provider?
- How will you help me pursue my goals?
- How much does your service cost?
- Can I choose which staff 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 can choose whether or not to share a copy of your NDIS plan with anyone.

If you do want to share all or part of your plan with your service providers, you can provide consent through the [myplace portal](#) or by contacting an NDIA or partner office.

Your providers must not share your personal information with anyone else without your permission, and they must comply with the *Privacy Act 1988*.

If you're concerned about how your provider is managing your privacy, ask them about their privacy policy and rules.

### 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?
For example, I want to get a job when I finish school.	For example, I want help to learn how to manage my time, build confidence and prepare applications and prepare for interviews.	For example, 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.	For example, ABC Recruitment

### Starting your supports and services

#### Pricing

The NDIA is responsible for setting price limits for many of the supports that your providers deliver.

Pricing arrangements are the rules around when and how a provider can claim for supports and services from your NDIS funds.

Our price limits and pricing arrangements help you get reasonable value for money from your plan funds.

The NDIA sets price limits for some of the supports included in your plan. The price limit is the maximum price that a registered provider can charge you for your NDIS funded disability support or service.

Learn more about [NDIS Pricing Arrangements and Price Limits](#) on the NDIS website.

## Service agreements

When you agree to use your NDIS budget to pay for supports, you're entering into a contract with your provider.

A service agreement is an agreement between you and your provider that makes it clear what you have both agreed to. It is covered by Australian Consumer Law.

It's a good idea to have written service agreement with your provider so you're both clear about what's been agreed. For example, what supports will be delivered and how they will be delivered.

Making a service agreement is a negotiation between you and your provider. You can involve another person, such as a family member or friend. Your provider may have a standard service agreement that you may like to use, or you can create your own.

Your provider should help you to understand any service agreement using the language and way of communicating you understand.

A written service agreement must be in place for Specialist Disability Accommodation (SDA) supports under the NDIS. For other supports, we don't need a written service agreement.

Learn more about [making a service agreement](#) on the NDIS website.

QUOTE FROM JOANNA BUTTFIELD, NDIS REGISTERED PROVIDER

**'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.'**

## Service bookings

Once you've worked out the supports you need and have chosen your provider, you'll need to set up a service booking for your provider.

You only create service bookings for NDIS registered providers. You don't need to create service bookings if you're using unregistered providers or if you self-manage your funds.

Service bookings are used to set aside funding for a NDIS registered provider for a support or service they will deliver. Service bookings are not the same as service agreements.

A service booking should only cover the supports that you and your provider have agreed to.



NDIS registered providers claim payments against the service booking in the [myplace portal](#). A service booking will show the type of support to be provided and the length of time it's needed.

Service bookings can be made by your NDIS registered provider on the [myplace portal](#).

You can also make the service booking - you can find out how to do this by using the [myplace portal step-by-step guides](#).

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

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

### **If you use a plan manager to manage your NDIS funds**

Your plan manager will create two service bookings on the myplace portal, one for their own service and another which allows them to claim payment from the NDIS for all services and supports in your plan. In this case, your plan manager will be able to pay both NDIS registered and unregistered providers for the services they provide to you.

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

You need to have service bookings in place so your providers can claim payment through the myplace portal. Either you or your provider can create service bookings.

### **Changing or cancelling a service booking**

You can change or cancel a service booking on the [myplace portal](#) any time before the service booking's end date. Any unspent money allocated for that service will be returned to your NDIS plan budget.

If you have a written service agreement with your provider, you should check the terms of the agreement when changing or cancelling a service booking.

### **Paying for your services**

Services are paid through the [myplace portal](#) or the [myNDIS app](#). The process is different depending on how your funding is managed.

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

There are two options to pay for your supports with your NDIS funding:

1. Once you receive an account, invoice or timesheet from your provider, you can make a Payment Request. This can be done online using the myplace portal. Money

from your NDIS plan budget will be paid into your nominated bank account within 24 to 48 hours. You can then pay your provider.

2. Once you receive your support you can pay your provider using your own money and get a receipt. You can then make a request using the myplace portal to have the money from your NDIS plan budget paid into your nominated bank account. You will be reimbursed within 24 to 48 hours.

You must keep records of your payments including invoices and receipts.

More information about paying for services as a self-managed participant can be found in the [NDIS Guide to Self-Management](#). The guide is available on the NDIS website or by calling the NDIA on **1800 800 110**.

### **If you are using a plan manager**

Your plan manager will pay your services for you and will keep records of your payments. Your providers will need to invoice your plan manager for any services they deliver.

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

Your NDIS registered providers will claim payments through the myplace portal. You'll need to make sure you give your provider your NDIS number, date of birth and surname.

## **Making sure your plan is working for you**

### **Keeping track of your budget**

Your funding will need to last for the entire period of your plan, so you should regularly check to see how much NDIS funding you have left. You can see your budget on the [myplace portal](#) in 'My Support Budget' or on the [my NDIS app](#).

You should keep a record of the supports you receive or ask your provider to give you copies of their service records.

If you're self-managing your NDIS funding, you'll need to keep all the invoices and receipts as well as bank statements from your nominated bank account for five years.

We may ask you to check your records at any time, so it's important to keep them organised so you can show how you've used your NDIS funds. You must spend your funding to buy the supports set out in your plan.

Learn more about self-managing your funding in the [NDIS Guide to Self-Management](#) on the NDIS website.

Service providers must not claim for services they have not provided. If this happens, contact your provider and try resolving the issue with them directly. If you're unhappy with the outcome, contact your early childhood partner, local area coordinator, support coordinator or the NDIA.

When it comes to your budget, aim to use what you need when you need it. If you haven't used all your funding at the end of your plan, it will not:

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

There are often good reasons why you can't use all your funding. But if you consistently don't use lots of your funding, we'll need to think about whether your supports are working for you. Any changes to future NDIS plans will be based on what is reasonable and necessary for your needs, taking into account how your supports are helping you build your skills and independence. There is information in the following pages to help you prepare for future plans.

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

If you're unhappy with the support you're receiving, you may wish to talk to your provider first. You can ask someone you trust, or an independent advocate, to help you talk with them.

If you don't feel comfortable talking with your provider or are unhappy with their response, you can contact the [NDIS Quality and Safeguards Commission](#) who is responsible for the regulation of providers. For more information about what the NDIS Commission can help you with, or to make a complaint about a provider, visit [ndiscommission.gov.au](https://www.ndiscommission.gov.au).

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, you will have an exit clause in your service agreement and you will need to agree to a date when you will finish working together.

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

We understand your situation or details may change. It's important you let us know if your situation changes or you need to update your details, because it might affect:

- your plan
- whether you're still eligible for the NDIS.

You must also let us know if it's likely one of these changes will happen in the future.

This could include changes like if:

- there are significant changes in the support your family and friends provide
- your condition improves or gets worse, meaning you need more or less support
- you're starting a new job and need new or different support at work

- you're going overseas for a long period of time or you're moving overseas
- you're moving out of aged care or other residential accommodation, and you need different support in your new home
- you receive or claim compensation for an accident or illness related to your disability.
- you want to explore whether a different home and living support, like an individualised living option, might be right for you

This does not always mean we will change your plan. But you must still let us know about these changes as soon as you reasonably can.

You can let us know about any changes by completing a [change of circumstances form](#) or you can let us know in person or over the phone.

You should also let us know if you change your contact details, such as your phone number, email or your home or postal address.

**DEBBIE, MUM OF CALLEE, NDIS PARTICIPANT**

**'Because of intensive speech therapy, Callee is now starting to say a couple of words. The other day she went to say good night to my husband Jim, and she'd normally just put her head on him, but she said "bye Dad".'**

## Reassessing your plan

### Your plan reassessment

Towards the end of your plan, we'll contact you to arrange a plan reassessment. We'll talk about what has worked for you in your current plan, and what you may need in future.

In this section of the booklet, you can start to prepare for your plan reassessment so you know what we'll talk about and what you'll need to bring.

We'll meet you face-to-face or over the phone, depending on what you prefer. You can include a family member, friend, advocate, a nominee or third-party decision maker, or another person in the reassessment.

### What do you need for your plan reassessment?

#### Preparing for your plan reassessment

When we reassess your plan, it's an opportunity to check that your supports are helping to build your skills and independence. It's important your NDIS plan and funding continue to work well for you and are adjusted as your life changes.

Your early childhood partner, local area coordinator or support coordinator will talk to you about what you need to bring to your plan reassessment.

Before your plan reassessment, think about:

- What worked well in your plan?
- What didn't work well?
- Have your supports helped you build your skills and independence?
- Has it helped you work towards your goals?
- Which goals you want to continue to work on and which goals you want to change?
- Will you need NDIS support in the future?
- Would you like to change how all or some of your plan funding is managed?
- Do you need more support to live independently?
- Do the supports you get at home meet your needs?
- Any assistive technology that is ageing, needs replacement or is no longer suitable.

You do not need to pick new goals at each plan re assessment, but the supports you receive should be helping you build your skills and independence and work towards your goals.

### **Reports I need to provide**

You'll need to bring along assessments or progress reports from your therapists or health professionals to show how your supports are helping you build your skills and independence. These reports may also make recommendations for supports you might need in the future.

For example, progress report from my occupational therapist.

### **Your plan may change over time**

As described in **Booklet 1 – Applying for the NDIS**, the NDIS is designed to increase your skills and independence. As your supports help you become more independent, 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 through your NDIS plan.

If you joined the NDIS through the early intervention approach your eligibility may be re-assessed at the start of each plan. This helps to make sure you continue to meet the eligibility criteria to receive NDIS supports.

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

## Things to discuss in your plan reassessment

Use the table below to answer the questions about your plan.

Question	Example	Your answer
<b>What worked well in your plan? What goals did you pursue?</b>	<p>For example, I got support to do things around the house like the washing and help with having a shower.</p> <p>I completed my work readiness training and now I'm ready to look for a job.</p>	
<b>What didn't work as well?</b>	<p>For example, I feel I need more support to help find a job. Finding a job is a long-term goal in my plan. My provider keeps changing the staff member who supports me.</p>	
<b>What questions do you have about how your plan is managed? Would you like to change how you manage your funding?</b>	<p>For example, 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.</p>	

Question	Example	Your answer
<b>Do you have any new goals for your next plan?</b>	For example, I want to become independent and eventually get back to work.	
<b>Your notes and questions</b>	<p>For example, 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?</p> <p>How do I share my plan with providers?</p> <p>Any assistive technology that is aging or no longer suitable and needs replacement.</p>	

## What happens next?

- Use your plan and funding to work towards your goals. Let us know if you need help to get started.
- Log into the [myplace portal](#) or [my NDIS app](#) to view and track your plan.
- Your local area coordinator or early childhood partner will keep in touch with you regularly to make sure your plan is working for you.
- We will contact you when it is time to reassess your plan.

Contact your early childhood partner, local area coordinator or support coordinator if you have questions, if your circumstances change or if there is anything else you'd like to discuss.



**National Disability Insurance Agency**

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