

What is the NDIS planning process?

[< Previous topic](#) | [Next topic >](#)

Developing your NDIS plan

There are five stages involved in developing your individualised NDIS plan:

For many people this first stage may seem the easiest but can be the hardest. This is why we have spent time working on your hopes, dreams, goals and aspirations with you .

As a person living with a mental health condition it is likely that your life has sometimes felt out of your control, with other people making decisions for you.

The NDIS offers opportunities for you to take back control and make decisions by yourself, or with the help of people you choose to support you.

To get the most out of the NDIS, choose the goals you want to work towards and identify the support you may need to help you get there. By completing the reimagine.today workbook you will have already thought about this which will help with the planning process. You will be contacted by a National Disability Insurance Agency representative to arrange a time and place to have a conversation about your life.

Many planning conversations happen over the phone. If you prefer, you have the right to request a face-to-face planning meeting.

Your first meeting with your planner will be about getting to know you better and to understand your goals and aspirations. They will ask you lots of questions and gather information about your life now, including how you manage everyday activities and your existing levels of support. We have helped you prepare this information through the reimagine.today workbook and encourage you to take it to your planning meeting.

Existing levels of support can be both formal and informal . Again, we have helped you to identify your supports through the reimagine.today workbook and encourage you to take it to your planning meeting.

Everyone's plan will be unique so the planner needs to understand you, your goals and aspirations, and what you need to help you get there so they can help you develop the right plan for you. Completing the reimagine.today workbook activity on goals and aspirations will help you be ready for this conversation.

If you have had trouble completing the workbook then bring your thoughts and ideas about:

- your goals
- your support needs to meet your goals.

Whether your planning meeting is face-to-face or over the phone, it is important to know that you have the right to have the supports you need for this conversation. Invite the people you trust to come to these planning conversations to support you in making sure the plan is what you want. You can also say who you do not want to be there.

Sometimes your planning conversation may need more than one meeting and it is OK to ask for more than one meeting.

Coordination of Supports

One important thing to think about as part of your planning is if you would like a support coordinator.

Some people with mental health conditions who get NDIS funding tell us that in the beginning they were unsure about how to select service providers and make their plan work for them to achieve their goals and aspirations. A support coordinator will provide you with information to help you select service providers and can help you while you develop the knowledge and skills to do this yourself.

If you have trouble with thinking, memory or planning - as many people with mental health conditions do - a support coordinator is a really helpful service that you might choose to pay for. For more information about NDIS Coordination of Supports check out the [Managing my plan](#) page from earlier in this resource.

After your planning conversation the National Disability Insurance Agency will use the information that has been collected to develop your NDIS plan. For more information on NDIS plans check out the [What is an NDIS plan?](#) page

Your NDIS plan

Don't agree to your plan until you are happy your support needs will be met in ways that will help you achieve your hopes and dreams .

Before your plan is finalised you can ask to see a draft copy. Some people have had surprises because what they thought would be in their plan was different to what was actually in the final plan. This meant they chose to ask for a [plan review](#). If you ask for a review this can delay your plan starting, however any supports and services you are receiving should continue until you have an NDIS plan.

Once your plan is approved by the National Disability Insurance Agency you will receive it in the mail. Then there are some other decisions you will need to make about managing your plan.

Funds management

With your plan you will likely receive funds to pay for some of your supports. You will need to decide how you want to manage your NDIS funds and if you need help to do this.

When it comes to these managing your funds there are four options:

1. **Self-management** - you can choose to manage your own budget
2. **A plan nominee** - this is usually a family member you choose but might be a guardian
3. **A National Disability Insurance Agency Registered Plan Management Provider** - this is usually an organisation that you choose, or
4. **The National Disability Insurance Agency** - can pay your support provider/s for you.

You will need to decide what options you would like to use for managing your funds. You may even choose to combine options and self-manage some of your budgets but then have someone else manage your other budgets. It is about what works best for you. For more information about funds management check out the [Managing my plan](#) page from earlier in this resource.

Choosing service providers

What is a provider? Provider is a term used to describe an organisation or worker that delivers a support or a product to a person who has NDIS funding. With your NDIS plan you have the power to choose where you get

your support from. You have two options:

1. Non-government service providers

You may choose to go back to a service you have used in the past or you may choose to use a new service. Non-government organisations need to be registered with the National Disability Insurance Agency. This requires them to meet certain standards for quality and safety. There are many non-government service providers. You can find out more information about community organisations supporting people with mental health conditions on the [NDIS website](#).

2. Directly employ your own staff

You also have the choice to employ your own staff. This could be a friend, family member, carer or other person who can provide you with the support you need. There are also some new business that can employ these staff for you. You can find more information about employing your own staff on the [NDIS website](#).

When your plan has been approved it is time to start to put it into action. Within seven days of your plan being finalised you will be contacted by a National Disability Insurance Agency representative to discuss how to put your plan into action. If the National Disability Insurance Agency does not contact, you then you can [contact them](#).

How do I put my plan into action?

If you have asked for and received approval for coordination of supports then this person will help you to put your plan into action. A support coordinator will help you to select service providers and implement your plan so that it works best for you to help meet your goals and aspirations; and to help create a life that is meaningful to you.

If you have not asked for coordination of supports, or if the National Disability Insurance Agency does not approve your request, then you will need to implement your own plan and this can sometimes be challenging. If your request for coordination of supports is not approved you can ask for that decision to be reviewed.

When you receive NDIS funding you will get access to a website called MyPlace. This is where you can get and manage information about your NDIS plan including paying for services when you self-manage your plan budget. You don't have to know how to use a computer to self-manage as you can also make arrangements to pay for services using paper forms .

[To learn more about MyPlace and to find the user guide check out the NDIS website information.](#)

How can I use my funded supports when I implement my plan?

Information about the types of supports you might get funding for is [available here](#) but don't let these categories limit your thinking about the supports needed to have a meaningful life.

There are three different types of money that the NDIS can give you that might relate to an area of your life where you have identified goals and aspirations.

1. Capacity Building

This is for support that enables you to build your independence and skills. This is the type of support most consistent with recovery.

2. Core

This is for support that enables you to complete activities of daily living and work towards meeting your goals. This type of support is more about other people doing things for you. This type of support is helpful when you are not living so well.

3. Capital

This is about buying things like assistive technologies, equipment and home or vehicle modifications. We need to learn and understand a lot more about how technologies and equipment can help people with mental health conditions.

Your funded NDIS services can be bundled and used flexibly for all supports across 'core' support categories and within individual 'capacity building' support categories. This means that you can use your supports in different ways at different times without asking the National Disability Insurance Agency for a plan review. Your service providers also need to be aware of this and you will need to provide them with notice to make a change to your plan. The notice you have agreed to provide will be included in your Service Agreement. There will be a service Agreement for each support provider you choose.

This means that if your circumstances change, including becoming unwell, and if your support needs intensify, that you can access more support to help keep you well and out of hospital. This arrangement can be included in your plan. This kind of plan is called an advance directive. An advanced directive means that when you are well you say what you want to happen to help manage your life if you are not doing so well.

Bundled and flexible funding means that if you are self-managing your plan funding you will have even more choice and control over both how, and when, you can get services. Remember that self-managing some or all of your funding gives you the most choice and control to live your life the way that you want to!

Your NDIS plan will be reviewed with a National Disability Insurance Agency representative at least every twelve months. If you become mentally unwell and need to go to hospital you can let the National Disability Insurance Agency know as there might be more they can do to support you.

At your review you will discuss:

- what has worked well
- what you have achieved
- what goals are not yet complete
- how your life has changed during the 12 months

All this information will help the process of revising and updating your plan.

If you have coordination of supports, your support coordinator will also help with reviews. Reviews of your plan with a support coordinator will happen more frequently than once a year because they will want to check in with you to see how you are doing and whether everything is working as planned.

You can also take a supportive person like a family member, friend or service provider to your review meetings with you.

You can ask for your review meeting to happen in person or over the phone.

[< Previous topic](#) | [Next topic >](#)