Tips For Your NDIS Planning Meeting
This guide is written in an easy to read way. We use pictures to explain some ideas.

The guide has been written by WA's Individualised Services (WAiS).

Some words in this document are written in **bold**. There is a list describing the meaning of these words and abbreviations on the last page of this guide.
Choose where you meet

You can have a phone meeting

You can meet at an NDIA office or an LAC partners office

You can ask for the planner to come to your home, but this is not always agreed to
The meeting may take up to 2 hours

Check that the planner has your current phone number, email address and postal address

If you have complex needs, you may be able to ask for a planner with greater planning skill
Bring someone with you

You can bring people with you

This may include a family member or friend,

a disability advocate,

a Local Co-ordinator, or a
Service Provider

It is important for you to be there, as planners like to meet the person the plan is about.

If it is hard for you to get and stay there, you can ask a family member or friend to help.
Bring copies of original documents

These could be planning documents, service provider reports, school records and letters about your disability.

Take photocopies and keep your originals.

You will also need to bring along 100 points of identification.

This is needed if you are to be a Plan Nominee and your loved one is over 18 years of age.
The NDIS generally accepts natural family relationships

You will also need your bank account details

You may want to have a separate bank account just for your NDIS money
Dream big and think about long-term goals, and how you would like yours or your loved one’s life to look like.

What does a good life look like?

What supports are needed to reach the goals related to your vision or dream?

WAiS also have a range of planning materials about Planning For a Good Life on our website or by request.

The more work you do about what you want your life to look like, and what supports you need, the better the planning results.
Fill in a Planning Booklet

There is a Planning Booklet 2 on the NDIS website page. WAiS also has a planning book, or there are many others online.

The planning you do for a “Good Life” is the basis for planning with the NDIS.

This is where you may wish to talk about your communication needs, safety issues, and your vulnerabilities.
List your goals

Remember to include short term goals, along with medium / long term goals.

Fill in a weekly timetable, listing all the things you do AND all the things you would like to do to ensure you have a good life.

The activities you have on your weekly timetable may help you to work out your goals, and how to reach them.

If you are at school, think about what you do during school term and during school holidays, as the supports you need may be different at these times.
How your disability affects your life

You will be asked some questions so the NDIS can work out how your disability affects your life.

Think deeply about where you need help, and why.

Think also about the barriers you may face that are related to your disability and the effect it has on you being able to live a good life.
Family, Friends and Community

The planner will ask about informal supports such as family or friends, or people you know in your area.

Make sure you list people you can rely on.

NDIS may ask what they help you with, and what days or times of the year.
Remember to include

Transport, Employment, Positive Behaviour Support and **Short-Term Accommodation** are all things to think about

☐ Transport
☐ Employment
☐ Positive Behaviour Support
☐ Short Term Accommodation

Think about what a person of the same age would be doing if they didn’t have a disability

Time away from family (which used to be called “respite” or “taking a break”) also means you can develop your living skills and have the type of life experiences that someone your age does
Reasonable and Necessary

What supports are “fair” and “something you must have” – known as Reasonable and Necessary. There are six things to think about here:

1. Vision and Goals
   Does the support work towards reaching the goals in your NDIS plan?

2. Social and Economic Participation
   Does it help you participate in your community?
   Does it help you be a part of your community?

3. Value for money
   Are the supports “value for money” or “good practice”?
4. Effective
Are the supports likely to be effective and beneficial to you?

5. Informal Supports
Does it include the informal supports which most people would usually expect family or the community to provide?

6. Formal Supports
Does it consider the formal supports that most people without a disability would usually use in their community? Is it the responsibility of the NDIS or another government body (eg Health or Education?)
You will need to include in your plan any **consumables**, home modifications, equipment, **assistive technology**, communication devices or **mobility devices** which you require.

- ☐ consumables
- ☐ home modifications
- ☐ equipment
- ☐ assistive technology
- ☐ communication devices
- ☐ mobility devices

Be sure to include any maintenance or repairs for your equipment such as wheelchairs, beds or hoists, etc.
NDIS Management types

Plans, or parts of plans can be managed differently. You can choose either:

**Self Management**

When you have total control to manage the NDIS funding and supports in your plan. You claim the funding directly from the NDIS.

**Plan Management**

You can ask for a Plan Manager, who acts as a **financial intermediary** who claims your funding from the NDIS and then pays your supports and services for you.

**Agency Management**

Agency management is when your service provider claims your funding from the NDIS. You can choose who the service provider is. You can have more than one service provider.
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You can have a mix of all these management types for different parts of your plan.

There are pros and cons for all management types but you do have the most choice and control and responsibilities when you self-manage.

It is helpful to have an idea of the type of management you would like to choose before you head into the planning meeting.

WAiS has an information sheet available to explain these options.
Support Co-ordination

Support Co-ordinators help locate service providers or people who can support you to reach your goals.

You can request support co-ordination in your plan, however, LAC Partners are assuming this role in many areas of WA and this role will eventually be phased out.

If your support needs are complex, there are also Specialist Support Co-ordinators available. They need to be an Allied Health Professional.
Be an Ambassador

It is important to work together to ensure the best outcomes for you or your loved one.

Aim to have a good relationship with your planner, and have open and clear discussions to make sure you get the best possible plan for a good life.
**Word List**

**Words and abbreviations used in this document**

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td>NDIA</td>
<td>This is the National Disability Insurance Agency. The agency who runs the NDIS</td>
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<tr>
<td>NDIS</td>
<td>The National Disability Insurance Scheme. The scheme which is run by the NDIA</td>
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<tr>
<td>Disability Advocate</td>
<td>Person who stands beside you to help promote, protect and defend your human rights</td>
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<tr>
<td>Local Co-ordinator</td>
<td>Local Co-ordinators are employed by the Dept of Communities and provide support to families and carers to assist them with services</td>
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<tr>
<td>Service Provider</td>
<td>A service provider is an individual or organisation delivering support to a participant (person) receiving funding</td>
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<tr>
<td>100 points of Identification</td>
<td>This is a selection of identity documents that prove who you are, there is a list available on the NDIS website</td>
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<td>Plan Nominee</td>
<td>Someone who applies or is appointed (usually a family member or trusted person) to help with reviewing or managing the plan</td>
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<tr>
<td>WAiS</td>
<td>WA’s Individualised Services – an organisation who works in partnership with people, families, carers and providers to help promote individualised supports for the person</td>
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<tr>
<td>Informal Supports</td>
<td>These are people in your family, friendship group or community who provide unpaid support and assistance</td>
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<td><strong>Formal Supports</strong></td>
<td>These are people or agencies who provide paid support and can include support workers, specialists, therapists, cleaners, transport services and the like</td>
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<tr>
<td><strong>Short-Term Accommodation</strong></td>
<td>This used to be called “respite” or “taking a break” and allows the person with disability time away from family to develop their independence and have some time away from home, it can also be in the person’s own home</td>
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<tr>
<td><strong>Reasonable &amp; Necessary</strong></td>
<td>This question is used to work out whether the support is needed and is good practice, and good value for money</td>
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<td><strong>Consumables</strong></td>
<td>These are items that include continence products, wipes, syringes etc and are related to your disability</td>
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<td><strong>Assistive Technology</strong></td>
<td>This can include equipment and items like equipment which is related to your disability and you may need for your daily tasks. It may be something which helps with seeing, reading, remembering, communicating or making everyday tasks easier</td>
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<tr>
<td><strong>Mobility Devices</strong></td>
<td>An aid to help assist people to get around in their community</td>
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<td><strong>Financial Intermediary</strong></td>
<td>A Plan Manager, who assists with paying invoices for services</td>
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<td><strong>LAC Partners</strong></td>
<td>These are the new version of the Local Co-ordinator, and will assist people to prepare their NDIS plans and reviews.</td>
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<td><strong>Allied Health Professional</strong></td>
<td>These include professionals like Physiotherapists, Speech Therapists, Occupational Therapists and Psychologists</td>
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<tr>
<td><strong>Ambassador</strong></td>
<td>A person who represents others to the best of their capacity</td>
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