
What is the NDIS planning process?

Step 6 - What is the NDIS planning process?

Developing your NDIS plan

There are five stages to develop your NDIS plan:

Stage 1. Think about your needs and goals

For many people this may seem easy, but it can be hard. This is why you have spent time working on your aims for the future (if you haven't yet, check out the [My future hopes and dreams](#) page).

If you live with a mental health condition, sometimes you might feel that your life is out of your control, with other people making decisions for you.

The NDIS lets you take back control and make decisions for yourself (or with the help of people you choose).

To get the most out of the NDIS, choose your goals and identify the supports you need to get there. By completing the reimagine.today workbook (or app) you will have already thought about this, which will help with the planning process.

Stage 2. Meet your personal planner

You will be contacted by an NDIA person to arrange a time and place to talk about your life.

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

The first meeting with your planner will be about getting to know you. They will ask about your life, including how you manage everyday activities and your existing support. You can prepare this information through the reimagine.today workbook (or app) and we encourage you to take the workbook to your planning meeting.

Existing levels of support can be formal (paid support services like disability, health or mental health services) and informal (family, friends, peers, clubs and other community connections). The reimagine.today workbook can help you list and describe your supports.

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

If you have trouble completing the workbook, simply share your thoughts about:

- Your goals (hopes, dreams and aspirations)

- Your support needs (people and equipment) to meet your goals.

Whether your planning meeting is face-to-face or over the phone, you have the right to support for this conversation. You can invite someone you trust to the meeting, to make sure the plan is what you want. You can also say who you don't want there.

Sometimes, your planning conversation may need more than one meeting. It's OK to request more meetings.

Support with your plan

Something to think about for your planning meeting is whether you want to request a Support Coordinator or a Recovery Coach to be included in your plan.

If you have trouble with thinking, memory or planning, they may be really helpful. For more information about NDIS Support Coordination check out the [Managing my plan](#) page, or for information about recovery coaches check out [this page](#).

Stage 3. Review your plan and manage your support

After your planning conversation, the NDIA will 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. Ask to see a draft plan before it is finalised. Some people have been surprised because what they thought would be in their plan was different to the final plan.

You can also ask for a [plan review](#). If you request a review, this can delay your plan starting. However, any services you currently receive should continue until your NDIS plan starts.

Once your plan is approved by the NDIA you will receive it in the mail. Then you can make decisions about managing your plan, such as...

Funds management

You will receive funds to pay for some of the supports in your plan. You need to decide how you would like your NDIS funds managed.

There are four options:

1. **Self-managed** - you choose to manage your own funds
2. **Self-managed (plan nominee)** - you choose a family member or guardian to manage your funds
3. **Plan-Managed** - you choose an NDIA-Registered Plan Management Provider to manage your funds
4. **NDIA-managed** - you choose to have the NDIA pay your support providers for you.

You need to decide how to manage your funds. You may choose to combine options and self-manage some of your budgets but have someone else manage other budgets for you. It is about what works best for you.

For more information about funds management check out the [Managing my plan](#) page.

Choosing service providers

What is a service provider? An organisation or worker that delivers support or products to people with NDIS funding. With your NDIS plan you have the power to choose who supports you. You may return to a service you have used in the past or you may choose a new service.

There are two types of service providers:

1. **Non-government service providers** - These organisations need to be registered with the NDIA. They need to meet certain standards for quality and safety. There are many non-government service providers. Find more about organisations that support people with mental health conditions on the [NDIS website](#).
2. **Directly employ your own staff (when self-managing or using a registered plan management provider)** - You have the choice to employ your own staff. This could be a friend, family member, carer or other person. There are businesses that can employ these staff for you. Find out more about employing your own staff on the [NDIS website](#).

Stage 4. Putting your plan into action

When your plan is approved it's time to start putting it into action. Within 7 days of your plan being finalised you will be contacted by the NDIA to talk about this. If the NDIA does not contact you, you can [contact them](#).

How do I put my plan into action?

If you have requested and received a Recovery Coach or Support Coordinator, they will help you put your plan into action. They will help you select service providers and implement your plan so that it works for you, and your goals and aspirations for a life that is meaningful to you.

If you do not have this support, you need to implement your own plan, and this can be challenging. If your request for a Recovery Coach or Support Coordinator 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 manage your NDIS plan, including paying for services when you self-manage your plan budgets. You don't have to know how to use a computer to self-manage as you can also pay for services using paper forms (like paying bills in the mail).

[Learn more about MyPlace and the user guide on the NDIS website.](#)

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 you need.

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

1. **Capacity Building** This support will help you build skills to become more independent. It is the support most consistent with recovery.
2. **Core** This support will help you complete daily living tasks and work towards meeting your goals. It might involve extra support from other people and might be helpful when you are not living so well.
3. **Capital** This is about buying things like assistive technologies, equipment and home or vehicle modifications.

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 you can use your supports in different ways at different times without asking the NDIA for a plan review. Your service providers need to be aware of this and you need to notify them when you make a change to your plan. The notice period (time) you have agreed to will be included in your Service Agreement. There will be a Service Agreement for each service provider you choose.

This means that if your circumstances change or if you become unwell, you can access more support to 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 advance directive means that when you are well you say what you want to have happen when you are not doing so well.

Flexible funding means if you are self-managing your NDIS funds, you will have more choice over both how, and when, you 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!

Stage 5. Review your plan

Your NDIS plan will be reviewed with an NDIA person at least every year. If you become mentally unwell and need to go to hospital, let the NDIA 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 last 12 months.

This information will help when revising your plan.

If you have a Support Coordinator, they will help you with reviews. They will also review your plan with you more than once a year, as they will check to see how you are doing and whether your plan is working for you.

Remember, you can ask to have your review meeting in person or over the phone. And, you can take a support person like a family member, friend or service provider with you.