# **Proposed NDIS planning journey for existing participants**

## Benefits we are working to deliver

### Reviewing your plans and goals

#### Check-in

* We’ll agree on a check-in schedule with you, or get in touch when a check-in might be needed
* Plans can be in place for up to 5 years, where this suits your circumstances
* You will be able to talk about the mainstream and community supports that can also help you pursue your goals
* You can update your personal statement and goals in your plan at any time

#### Independent assessment

* Independent assessments will be free and easy to access
* Everyone will get access to high quality assessments that will inform more consistent and fair NDIS decisions
* You will get your assessment results

### Creating your plan

#### Draft plan

* You will get a draft plan with your draft Personalised Budget before your plan approval meeting
* Your plan will be easier to understand and use – with a flexible budget and a fixed budget

#### Plan approval meeting

* You will meet with the person approving your plan
* There will be no need to negotiate each support as you will have much more choice and control over how you use your plan
* You will have an opportunity to discuss what should be in your flexible and fixed budgets, and how you would like to access and manage your budget

### Using your plan

#### Plan implementation meeting

* Plan implementation meetings will focus on helping you to pursue your goals and get the most out of your plan
* Local Area Coordinators will be able to provide greater support to help you use your plan

#### Using your plan

* You plan will be much more flexible
* It will be up to you how you spend your flexible budget – you can save, buy and negotiate the services and supports that you need to get the most out of your plan
* There will be more information and evidence on supports that work best for participants like you

## Tailored approaches for:

* Participants from culturally and linguistically diverse communities
* Participants with complex support needs
* Aboriginal and Torres Strait Islander participants
* Participants in rural and remote areas
* Early Childhood Early Intervention

## Problems we are working to solve

**Reviewing your plans and goals:**

* Plan reviews take a lot of time to prepare for
* You have to collect (and pay for) your own evidence
* Plans are often less than 2 years long and plan reviews usually happen each year

**Creating your plan:**

* Planning meetings feel like a negotiation for support
* If you can’t afford expert assessments it is harder to get the right funding
* There can be delays with approving plans and long quote approval processes
* You don’t see a draft plan before it is approved
* Approved plans are not always explained

**Using your plan:**

* Current plans have limited flexibility which means you can’t decide how best to use your plan
* It is difficult to make changes to your plan and often this means you need a whole new plan approved, which can take time

## Proposed NDIS planning journey for existing participants – detailed overview

### Check-in

We will check-in with you at agreed timeframes, or as required.

At the check-in, we will talk to you about your current plan as well as your:

* living arrangements
* informal, mainstream and community supports
* social connections and work commitments

This will help us connect you with the right community and mainstream supports if you need them.

Plans will be in place for up to 5 years, and most check-ins won’t result in a change to your plan. We will let you know ahead of time if it is time for a plan reassessment.

You might be referred to an independent assessment to inform a new plan if:

* This is your first time going through the new planning process
* Your circumstances have changed significantly
* It is time to reassess your plan, based on how long your last plan was for
* It has been more than 5 years since your last assessment

For smaller changes to your current NDIS plan (not increases to flexible budgets), a variation can be made.

### Complete Independent Assessment

If you are referred to an independent assessment, you will be able to choose a local assessor organisation from our panel to complete your assessment with.

The assessor organisation will make any reasonable adjustments to the process to make sure you can actively and safely participate.

You will also need to choose someone who knows you well to answer part of the assessment.

Once you have completed your independent assessment, you will be given a copy of your results.

### Receive Draft Plan

We will develop a draft plan using information you have provided and from your independent assessment.

You will receive a copy of your draft plan before your plan approval meeting. You might like to start thinking about how you want to use your funding to meet your needs and pursue your goals.

The draft plan will include:

* Participant and nominee details
* Goals
* Mainstream and informal supports
* Draft Personalised Budget (flexible and fixed)
* Any specified supports (such as high cost assistive technology or home modifications)

You will also be given information on what to do to prepare for your plan approval meeting. This might include preparing any additional information required for fixed supports or where quotes or additional information is required.

If information gained through the assessment process indicates you might not need NDIS funded supports, you will be assisted to transition to mainstream and community supports.

### Hold Plan Approval Meeting

You will meet with an NDIA delegate to review your draft plan and Personalised Budget. Ideally your plan will be approved at this meeting.

You will discuss:

* Plan management options
* When the plan will be reassessed (up to 5 years)
* When you’d like the NDIA to check in with you
* How frequently you’d like funds released

In this meeting you can also raise any additional high cost support needs not previously identified – things like high cost assistive technology or home modifications. The delegate will provide guidance on what supporting information will be required to finalise funding for these support items.

You won’t have to negotiate each service or support you need. Your plan will be much more flexible, so you will have much more choice and control over how you use your plan.

In the meantime, the delegate will approve your plan so you can get on with using your plan.

### Hold Plan Implementation Meeting

You will meet your NDIS contact or LAC to discuss how your new NDIS plan can be used to help you pursue your goals.

Your LAC or NDIS contact will explain how your flexible and fixed budgets work and will give you tools and resources to help you understand and implement your plan.

You might also like to discuss your goals and how your NDIS plan might support you to pursue these.

From here you can implement your plan and can get help from:

* LAC and NDIS resources (e.g. website)
* Family and friends
* Support coordinators and plan managers
* Providers
* Community