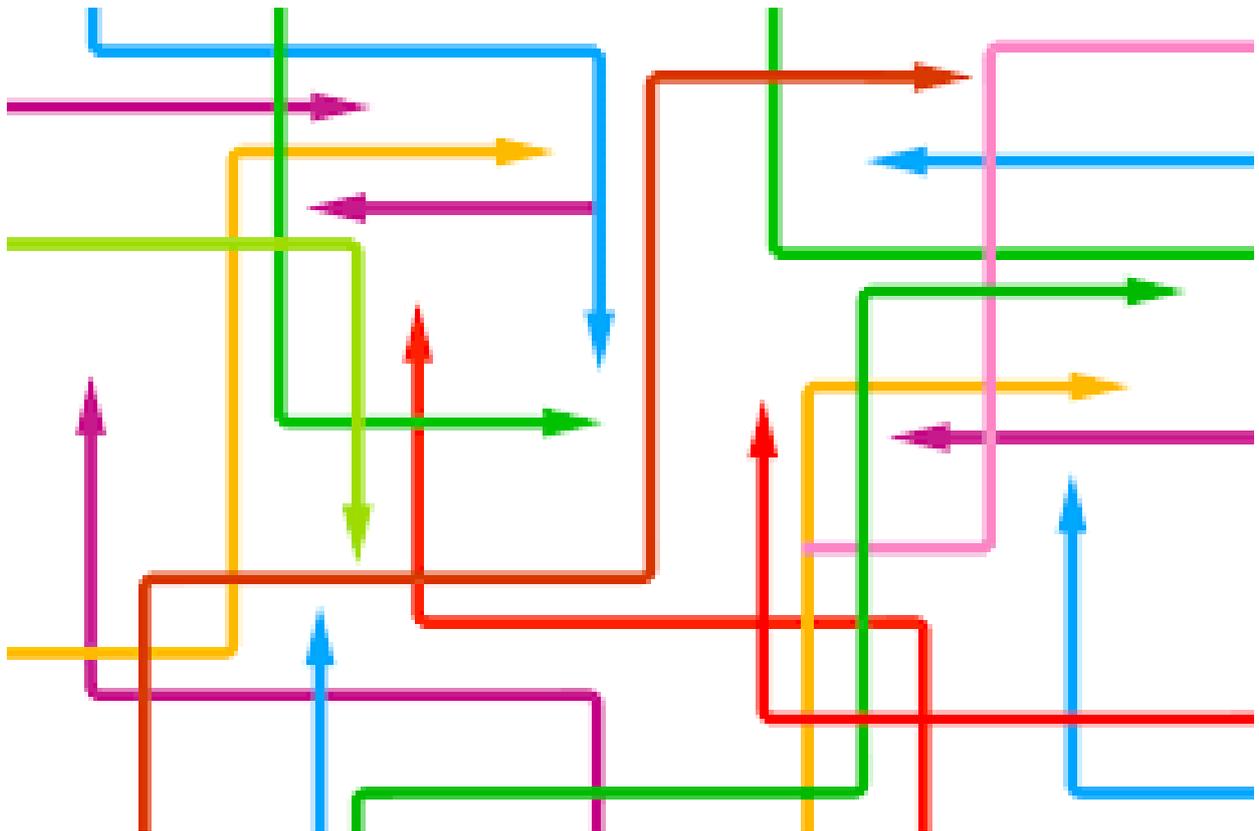




# NDIS Survival Activity Book



## Volume 2: NDIS Planning



# Who are we?

## The VMIAC story

The Victorian Mental Illness Awareness Council (VMIAC) is the peak body for people with lived experience of mental ill health in Victoria. As such, all staff members employed by VMIAC have experience of mental ill health. Which is why our motto is 'By and for consumers'.



## VMIAC's vision:

A world where all mental health consumers stand proud, live a life with choices honoured, rights upheld and these principles embedded in all aspects of society.

# Gratitude

VMIAC would like to extend it's sincerest gratitude to the members of the NDIS Critical Reference Group. This group informs and evaluates the resources VMIAC's NDIS team creates and this workbook would not be possible without their contribution.



Gratitude is also extended to those whom contributed their knowledge, experience and expertise to make this workbook what it is. Thank you.

# Purpose of Activity Book

This is **Book 2** in the NDIS Survival Activity Book series!

## **Book 1 – Applying for the NDIS:**

Book 1 is about applying for the NDIS. You will find information and activities about what the NDIS is, how to apply for the NDIS and how to make your application as strong as it can be.



## **Book 2 – Planning for the NDIS:**

Book 2 is about preparing for your planning meeting. This includes information and activities around setting your goals, ways of managing your plan and support coordination.



## **Book 3 – Appealing a decision made by the NDIS:**

Book 3 is about appealing NDIS decisions made about whether or not you can access the NDIS and other times you may appeal such as when a support you ask for isn't approved.

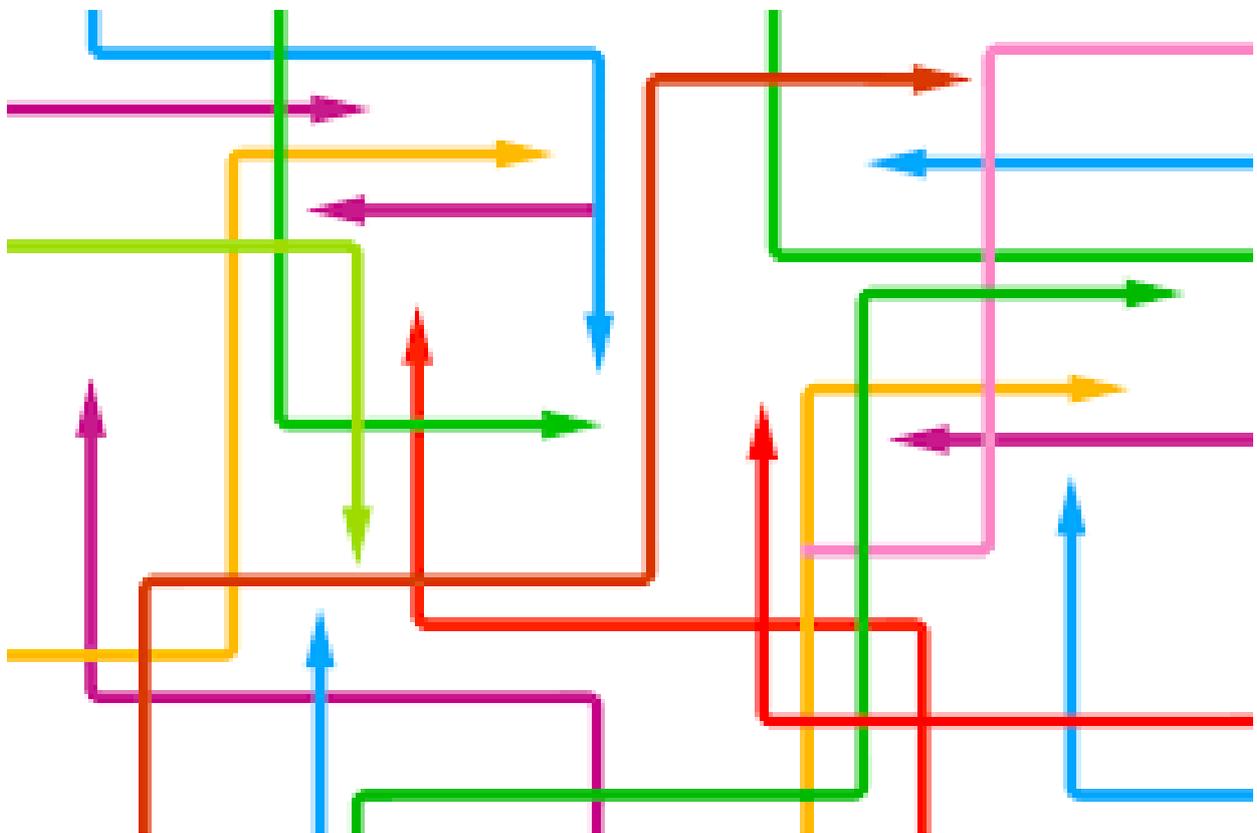


# What is a planning meeting?

A planning meeting is an opportunity to speak about what you want and need from the NDIS.

A planning meeting is a discussion between you, a planner (which can include a Local Area Coordinator) and any support persons you decide to bring.

A planning meeting typically lasts 1.5-2 hours.



# What happens in a planning meeting?

## What do I need to bring?

**You will need to bring your:**

myGov details

Any notes or books like this one

Any helpful evidence

(eg: Reports, Impact statements, Notes)

In your planning meeting you will get asked questions about your **daily life, your supports and your goals**. These are big questions and it can be intimidating but this book will help you prepare.

**Remember:**

The planning meeting is about you.  
You can go at your own pace and ask questions and take breaks.

# Preparing for a planning meeting

You can use volumes 1 and 2 to prepare for your planning meeting and as evidence during your planning meeting.

You might consider using a plan nominee, support person or advocate to help.



## What's the difference?

A **plan nominee** is a person who you can ask to attend planning meetings and do any planning related activities **on your behalf**.

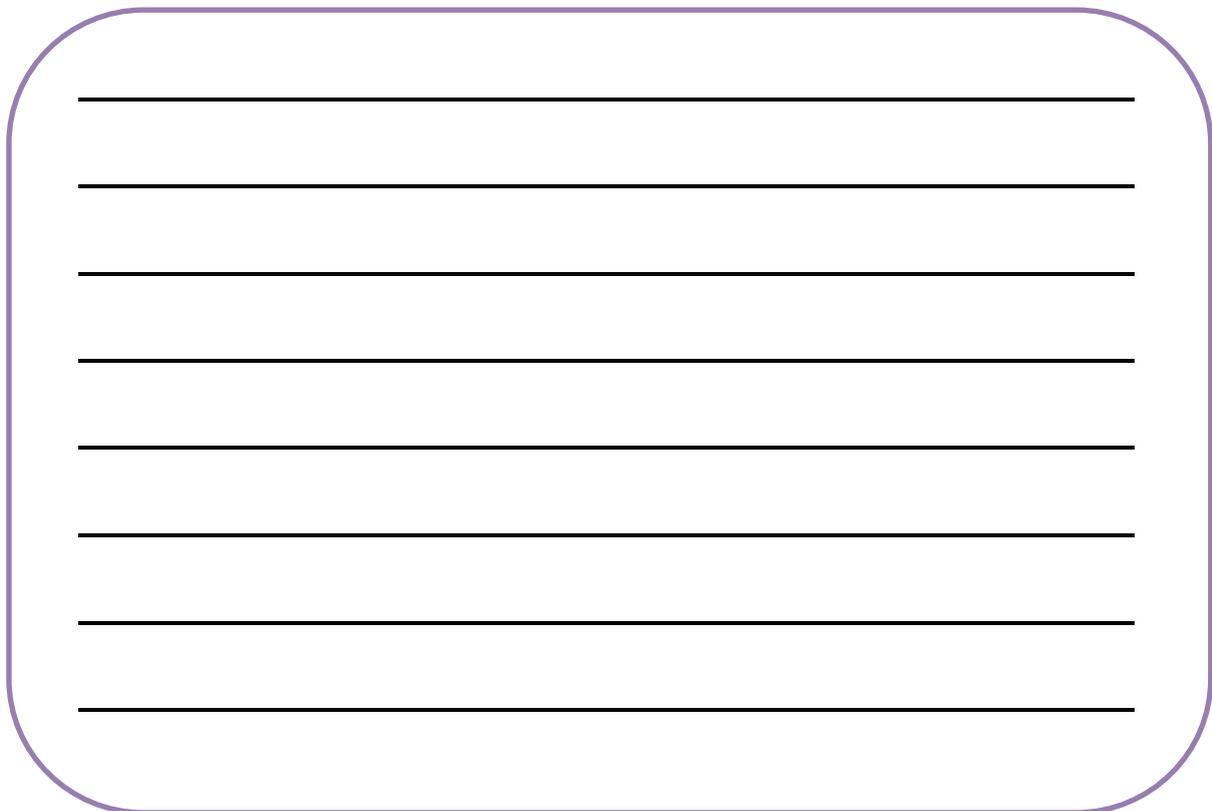
A **support person or advocate** may also help. They can attend meetings **with you and assist you** to tell your story.

# Know your rights

Planning meetings can be structured in many ways to make them more comfortable for you. For example, you can ask to have your planning meeting...

- Split into two
- In your own home or on the phone
- Or to have a support person, advocate or plan nominee

**What would make you feel more comfortable during your planning meeting?**



A large rounded rectangular box with a purple border, containing ten horizontal lines for writing.

# How to self-advocate

**Self-advocacy means  
to represent one's self  
and/or views.**

Self-advocacy in a planning meeting means standing up for your rights and what you need for your disability.



Self-advocacy can also mean having a plan nominee or support person there to help you.

# Practicing self-advocacy

Try jotting down some ideas to prepare for your planning meeting

**Without support, I can't...**



**I want...**



**I need...**



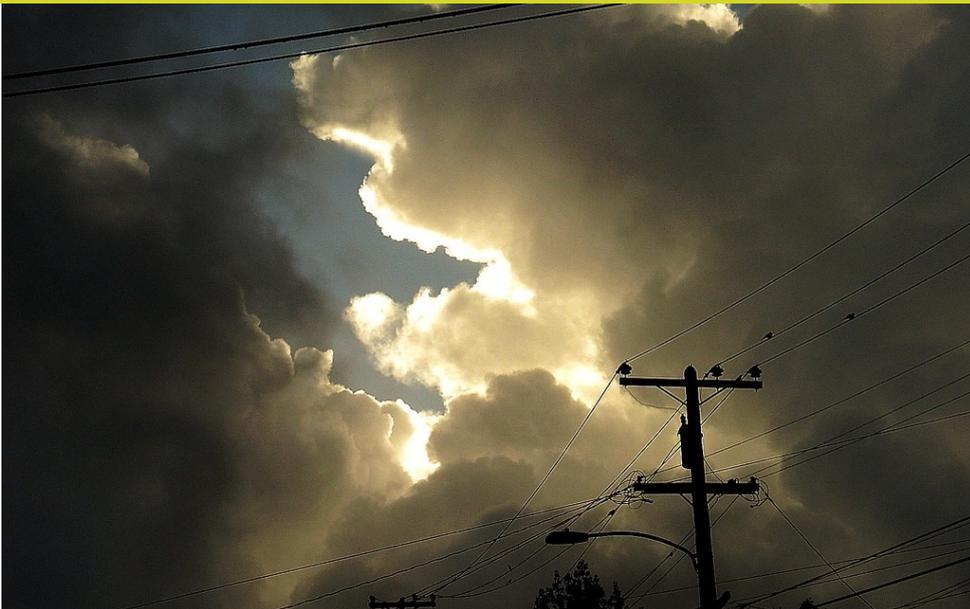
**I expect...**



# A shift in perspective

In a planning meeting you still need to talk about your struggles. But now you are planning you also get to start thinking in terms of your goals and aspirations.

**Planning is like the sunlight peaking through storm clouds.**

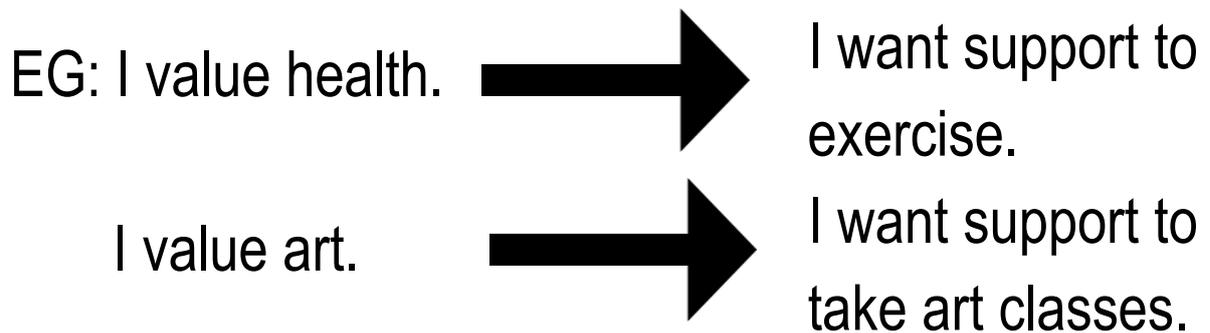


There are many different ways to set goals. We will go through some of them in this book.

It is important to remember that you are a constantly evolving person, and **your goals may shift and change just as you grow and change. This is okay.**

# What are your values?

Sometimes it is easier to come up with what we value and link goals to this.



**Try linking your values to goals.**

**Values. | Goals.**


# SMART goal setting

## Specific:

What? Where? How?



## Measurable:

How will you measure success?



## Attainable:

Can you achieve the goal in the time frame?



## Relevant:

Is the goal in line with your values?



## Timely:

The length of your NDIS plan can be a measure.



A SMART goal might be 'I exercise three times a week for half an hour by the end of my first NDIS plan.'

# Capacity building goals

Your goals can be designed to get your certain kinds of funding. You might ask to improve your capacity. This opens you up to more support options such as Psychology and Occupational Therapy.



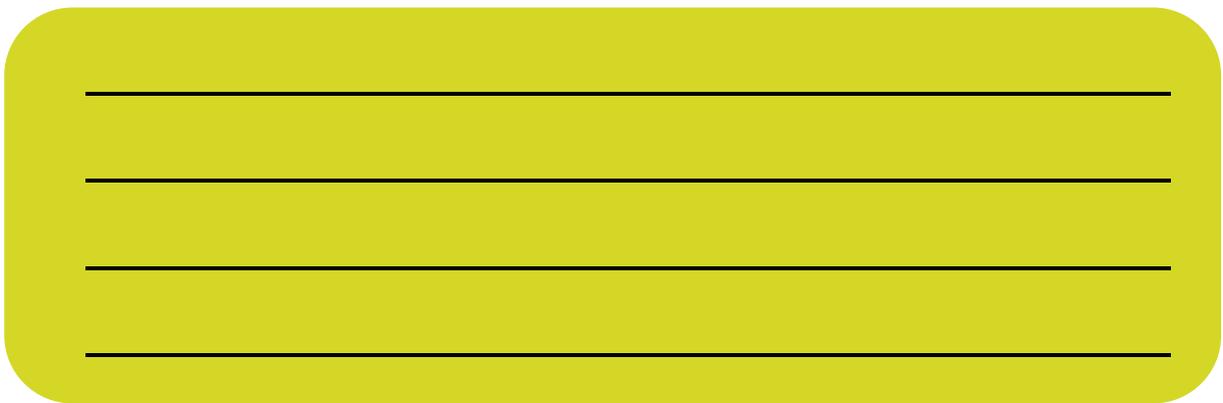
**Example:**

**'I want to increase my capacity to deal with and respond to the symptoms of my Obsessive Compulsive Disorder.'**

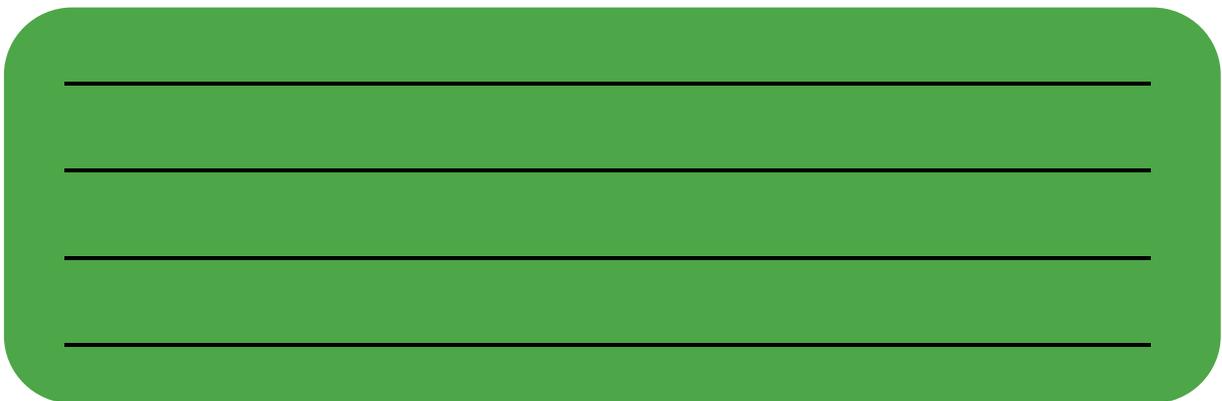
# What are your goals?

Write some of your goals here. Your planner may tell you can only have a few goals but this is not true. The planner also can't change your goals.

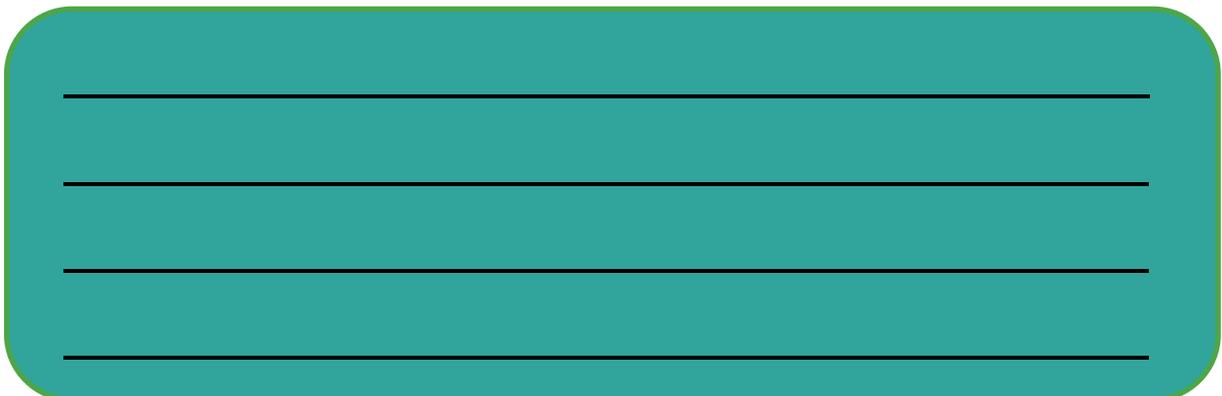
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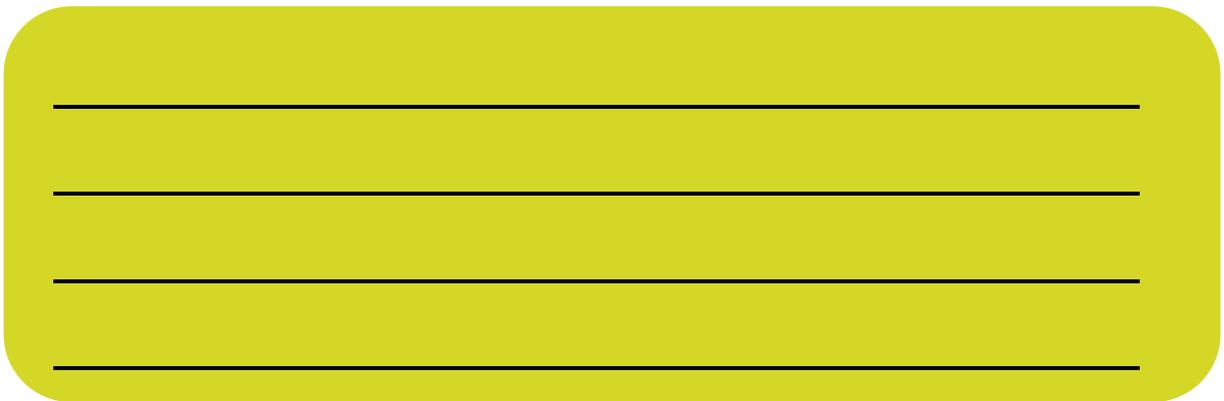
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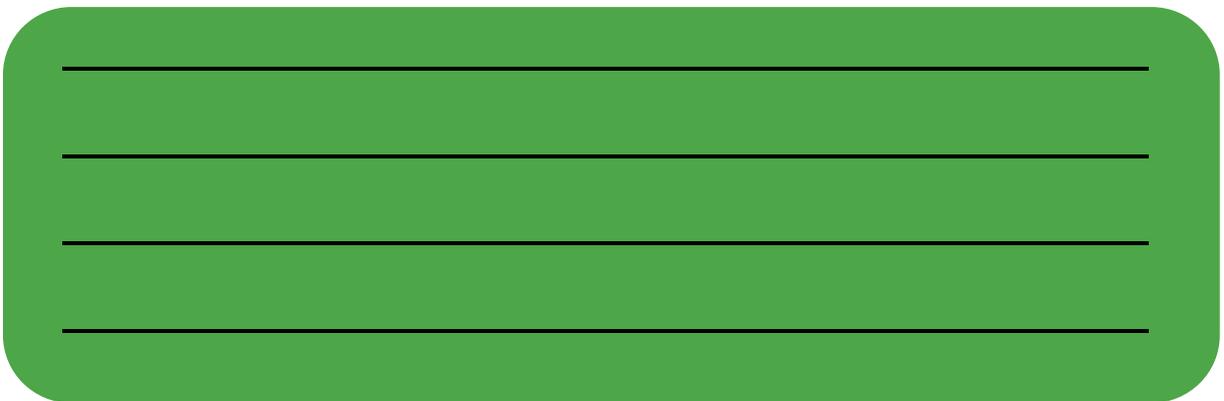
# What are your goals?

Write some of your goals here. You will need at least two goals for your NDIS plan but it is your right to have more if you like.

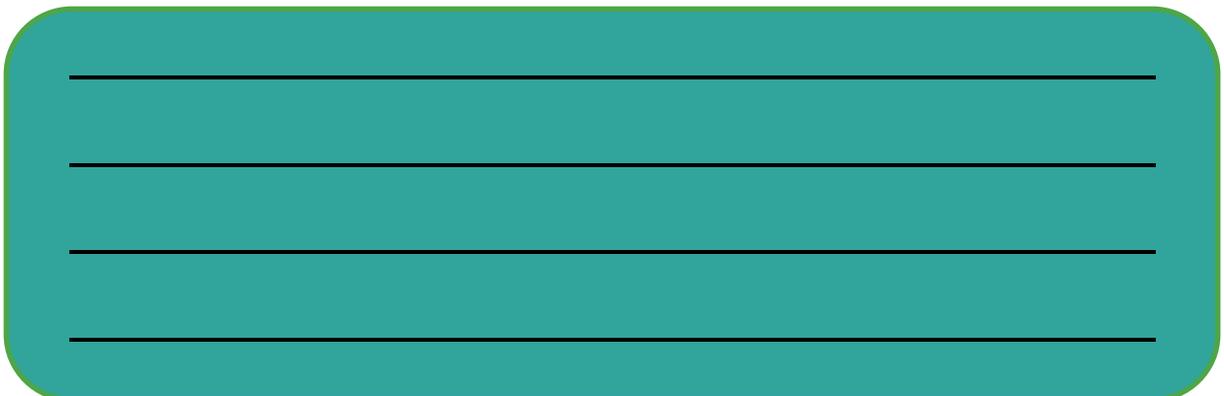
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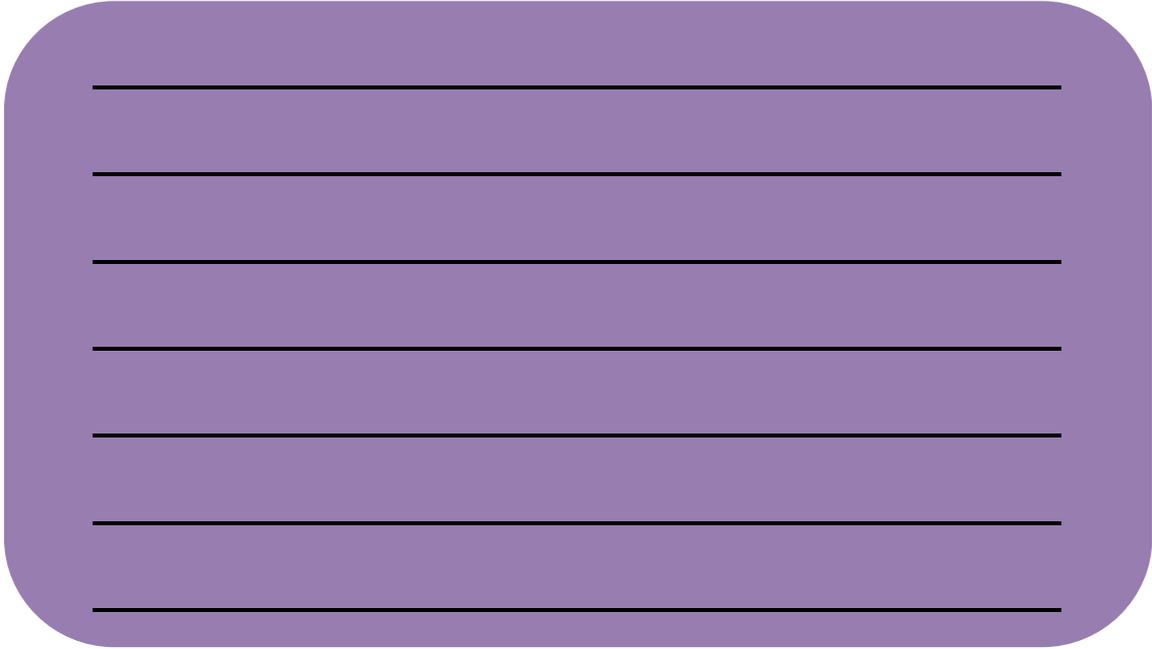


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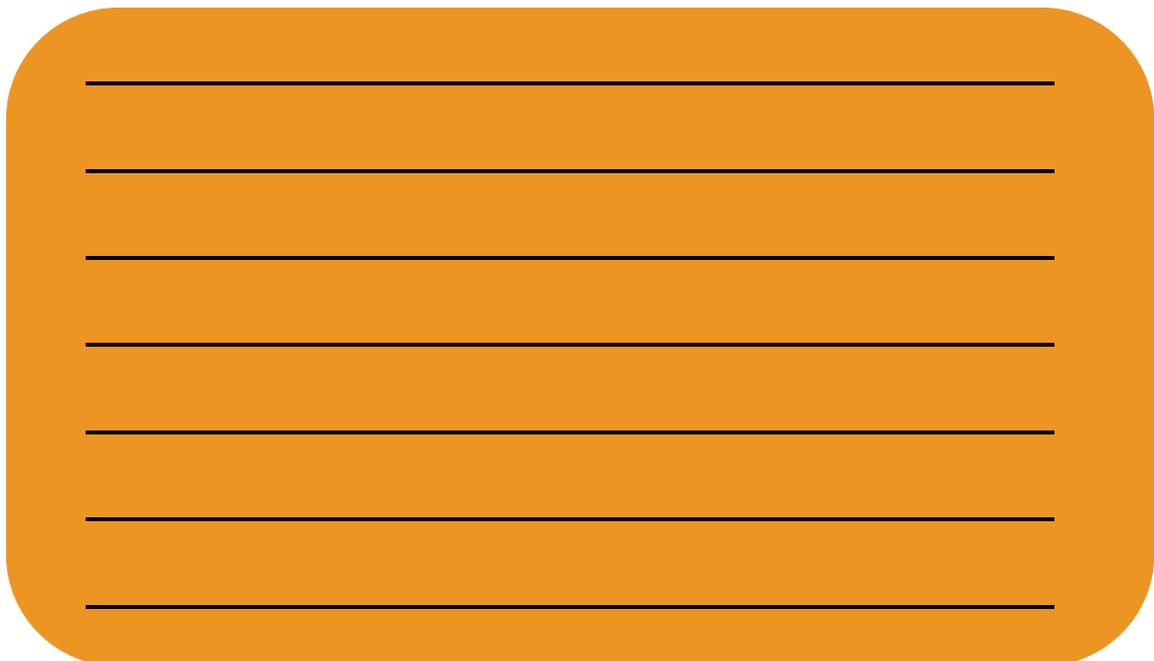
# Your future:

How would you like your life to change this year?



A purple rounded rectangular box with eight horizontal lines for writing.

Ideally, how would life be different in 5 years?



An orange rounded rectangular box with eight horizontal lines for writing.

It's okay if you find it hard to think this far ahead.

# Goal setting is hard

We understand that goal-setting can be intimidating and challenging. That's okay.

That's why there are organisations like VMIAC and others out there to help.



VMIAC recommends contacting an advocate or working with someone you trust to work on your goals. Your goals play an important role in shaping your plan so we want you to feel confident moving forward with them.

# Why is goal setting so important?

Goal setting is so important for your planning meeting because **the supports you are funded for must be in line with your goals.**

**1.** Your support being in line with your goals is something that makes it **Reasonable and Necessary.**

Support for volunteering may help achieve goals:



Volunteering can increase employability, and get someone involved in the community.



Volunteering could also meet the goal of increasing independence

There are five other criteria your support must meet to be **Reasonable and Necessary.**

# Reasonable and Necessary

2. Your support also must increase **social and community engagement.**

The NDIS will not generally fund supports that do not increase your involvement with your community.

This might mean support to help you with volunteering, or engaging with hobbies and interests. But can also include support workers and therapy.



# Reasonable and Necessary

## 3. Your supports must also be **value for money**.

This means that your support must not be similarly priced to other supports.

The support must also reduce NDIS spending in the long run by making you less reliant on other supports.



## 4. Your supports must be **likely to be effective and best practice**.

Supports approved by the NDIS must be deemed helpful as found by research and shared community opinion.

# Reasonable and Necessary

5. Supports **usually can't be provided by family or the community.**

The NDIS takes into account what is fair to ask your family to do. This means NDIS



generally won't provide funding to a family member to provide you support as they already provide support informally. \*There are some exceptions.

6. Your supports must **not be more appropriately funded by another service (health, justice, etc)**



The NDIS is an insurance scheme. If a support can be more suitably funded by another service then the NDIS will not fund the service.

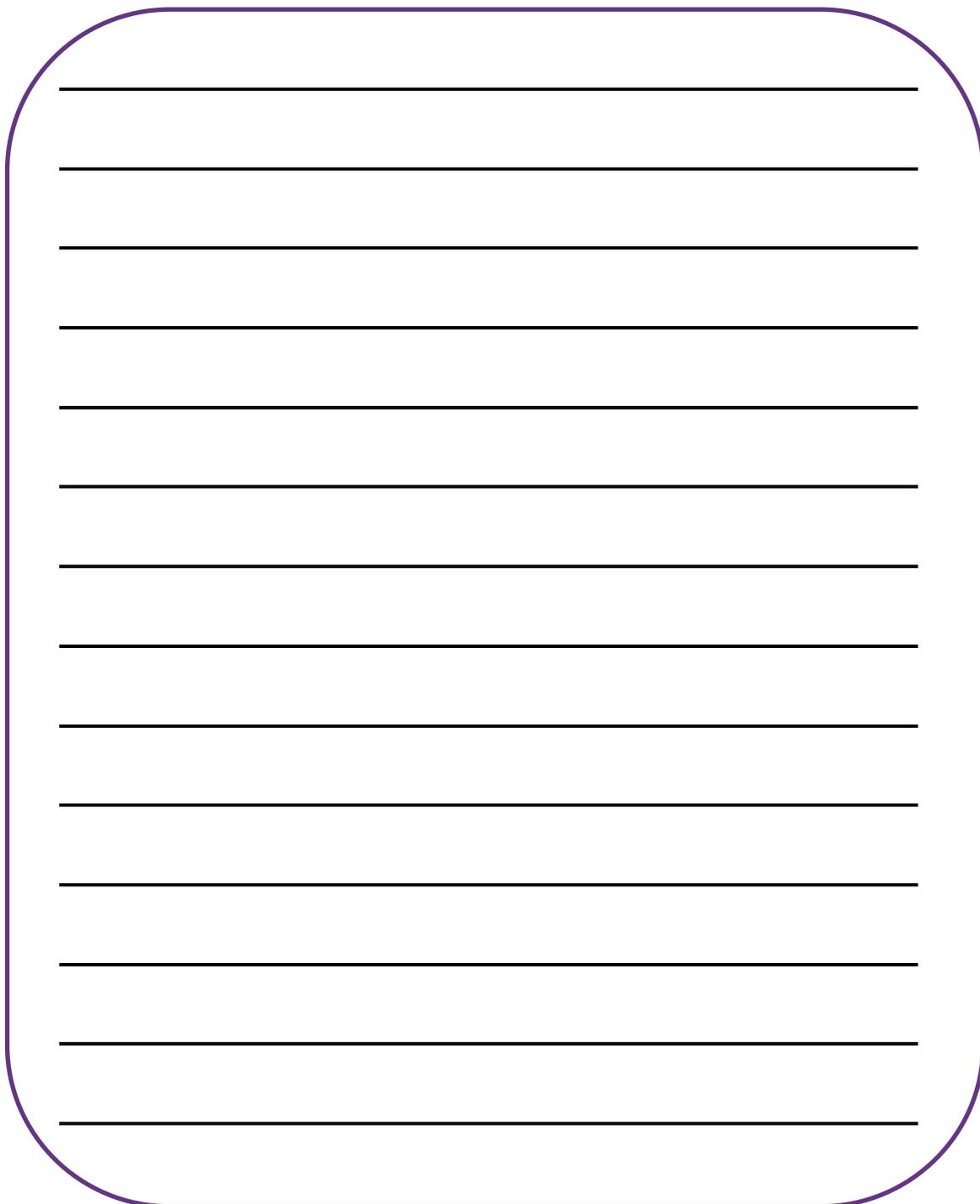
# It's not black and white

Like many things in the NDIS, the reasonable and necessary criteria can seem very black and white. But look for the grey. There are always ways that you can argue your case.



# Arguing your case

It can help to think through your argument before your planning meeting. **Why is your desired support reasonable and necessary?**



A large rounded rectangular box with a purple border, containing 15 horizontal lines for writing. The lines are evenly spaced and extend across the width of the box, providing a space for the user to write their argument.

# What are some supports you would like?

Now that you have some understanding of Reasonable and Necessary, **what supports would help you to function better?**

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**What would you like to do more of?**

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**What is your dream scenario?**

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# Other things do consider before planning meeting

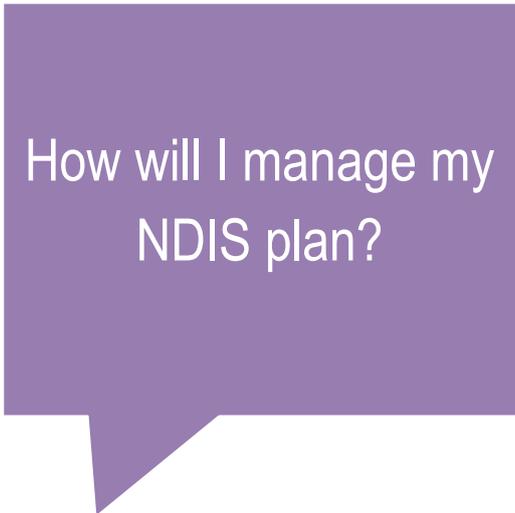
We have asked many important questions so far in preparation for your planning meeting:

- **Where shall I have my planning meeting?**
- **Will I have a plan nominee?**
- **What are my goals?**
- **Are my supports reasonable and necessary?**

But there are three other important questions to consider:



What supports do I currently have?



How will I manage my NDIS plan?



Do I need support coordination?

# Key supports in my life

The NDIS are interested in what supports you have in your life and how to improve on them. The NDIS breaks support up into two categories: formal and informal.

<b>Formal supports</b> ie: Psychologist Social Worker Psychiatrist Peer Worker What sorts of things do they help with?	<b>Informal supports</b> ie: Family Friends Neighbours Partner What sorts of things do they help with?

# Management styles

## NDIA/Agency Management

Positives	Limitations
<ul style="list-style-type: none"><li>•Range of NDIS Providers</li><li>•Relatively easy</li><li>•Providers claim funds electronically</li><li>•No paperwork</li></ul>	<ul style="list-style-type: none"><li>•No external providers</li><li>•Must use NDIS price guide</li></ul>

## Plan Management

Positives	Limitations
<ul style="list-style-type: none"><li>•Use both NDIS and non-NDIS providers</li><li>•Third-party manager</li><li>•Limited paperwork</li><li>•Can pay below the NDIS price guide</li></ul>	<ul style="list-style-type: none"><li>•Plan manager must be NDIS registered</li><li>•More rigidity than self managed</li></ul>

## Self Management

Positives	Limitations
<ul style="list-style-type: none"><li>•Use both NDIS and non-NDIS providers</li><li>•More choice and control</li><li>•Can pay above or below the NDIS price guide</li><li>•More creativity</li></ul>	<ul style="list-style-type: none"><li>•Lots of paperwork</li><li>•Must keep all receipts in case of audit</li></ul>

# Use this matrix to help you decide how to manage your plan:

	Self Managed	Plan Managed	Agency (NDIA) Managed
Can I use registered providers for supports and services?	YES	YES	YES
Can I use any providers I choose for supports and services?	YES	YES	NO (registered only)
Do I need to keep full records of all invoices/receipts?	YES	NO	NO
Do I need to pay bills and make claims from the NDIS portal?	YES	NO	NO
Can I ask for copies of all invoices?	YES	YES	YES
Will billing issues be resolved for me?	NO	At some level (but still your responsibility)	YES
Should I set up a separate bank account?	YES	NO	NO
Do I have the power to approve each payment from my plan to providers?	YES	YES (ask your plan manager)	NO
Can I easily see all my plan balances and invoices paid at any time?	If you keep good records	Depends on what your Plan Manager offers	NO
Is there an app for me to keep track of everything?	Can be purchased using NDIS CORE plan funds	Depends on what your Plan Manager offers	NO (balances/basic claim info only)
Do I need to pay my providers up front?	Depends on your providers	Depends on your providers	NO
Can I be reimbursed for continence aids I bought at the local supermarket? (assuming they're needed for disability reasons)	YES	YES	NO
Are you bound by the \$\$ caps in the NDIS Price Guide	NO	Generally yes (but ask your plan manager)	YES
Does it cost me extra to manage my plan this way?	No, but you may pay for extra help from your plan \$ if you choose	NO (Plan Management Fees are added extra to your plan)	NO
Do I, or all my providers have to make Service Bookings to reserve funds in my plan?	NO	NO (your Plan Manager makes a booking for all)	YES

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# Changing your management styles



## Remember:

You can change your management style by calling the NDIA and requesting a light touch review!

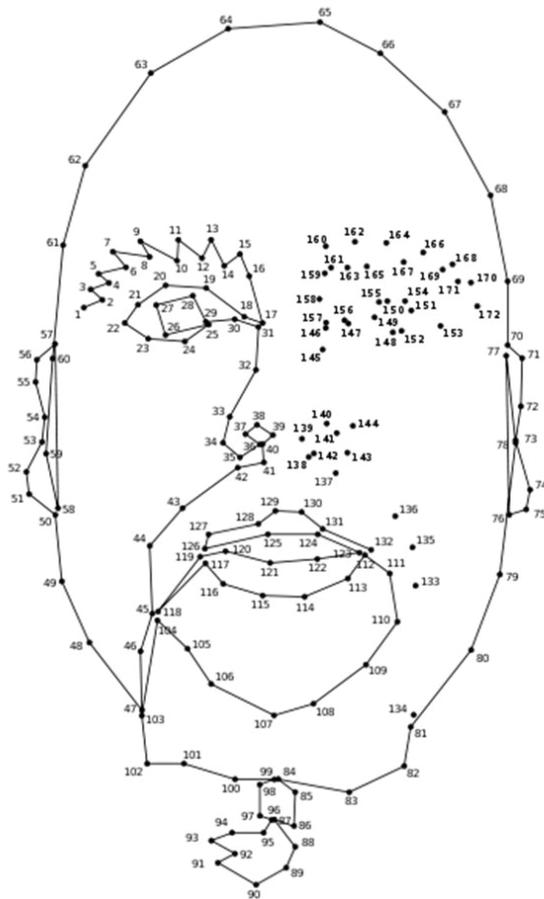
You can also always use a combination of management styles.

ie: a plan manager for your cleaner and self-management for your support worker.

# What is support coordination?

Support coordination is a reasonable and necessary support that you can ask for in your planning meeting. Support coordinators help you to:

- Connect to supports
- Link with community activities
- Engage with providers
- Develop service agreements
- Use the participant portal
- Prepare for your next planning meeting
- Build your capacity to learn about and use the NDIS



# How to build an argument for support coordination

When asking for support coordination in your planning meeting, it is important to highlight how your disability impairs:

- Managing daily tasks
- Planning and making appointments
- Making decisions and contacting organisations



If you have complex needs it is useful to ask for 100 hours of support coordination.

You can also ask for specialist support coordination which is delivered by specialists.

# Questions to ask a Support Coordinator

## **Do they have knowledge about people like me?**

Your future support coordinator needs to have knowledge about your psychosocial disability and how it impacts your life.

## **Is their knowledge localised?**

It is no use to you if they know all about your dream supports but not where you live.

## **Do they have knowledge about what I want?**

Your support coordinator must understand the supports you want and how to engage them.

## **What do their costs cover?**

Your future support coordinator will likely charge for travel and phone calls. You can compare rates between support coordinators if you live rurally/regionally.

# It's your choice!

One of the best things about the NDIS is the emphasis on what is called **'choice and control'**.

This means you get to make whatever choices suit you and your disability. Which ultimately means that if you are unhappy with your support coordinator, you can always change!



Some fees may apply to end a support coordinators contract early. You can negotiate this when you are employing them as a support.

You can find out about support coordinators in your area by searching your myPlace portal.

# What happens after a planning meeting?



You will be contacted by the NDIS once your plan is approved. Your plan will be available on the NDIS myPlace portal about 24 hours after it has been approved. You will also receive a printed copy of your plan either in person or in the mail.

If you have Support Coordination as part of your plan, your Support Coordinator will contact you to help you access your supports. If you are self-managing you will be contacted to go over your responsibilities.

# Your life on the NDIS

Applying for the NDIS and going through the planning meeting process can be a lot of hard work. But it can be so **worth it**. Check out the story below.

## Kristin's story

Kristin was very stressed by the process of needing to prove her needs, especially around capacity building. 'I felt it was really important to be as honest, as I could allow myself to be, about how day-to-day life is for me', even though this was painful to do.

She suggests that once you translate your goals into NDIS speak for the planning meeting, you may also need to also translate them back into your own language - so that they are personally meaningful to you. Kristin also highlights the importance of making sure your evidence and requests are in line with your goals.

Kristin was helped by these strategies, and received a generous plan which meets her support needs. She says it was very affirming to be heard, her health is much more stable now, and that 'It (NDIS) has actually made a really big difference'

'I'm starting to feel like recovery and NDIS can be meaningful and work together.'

# Your yearly plan review:

Typically NDIS plans last for one year. But you can request for your plan to last longer in your planning meeting.

Around 3 months before your plan is set to end you will need to start preparing for your regular plan review.

Preparing for your plan review is quite similar to applying for the NDIS. You will need to gather evidence about your disability and its impact on your life.

**It is important to include about how your supports are helping you but also what still needs to be done.**

We highly recommend including progress reports from your providers and evidence to support you receiving any new supports that you would like to meet your goals.

Many people get nervous leading up to their plan review. But it a plan review is an opportunity to make your plan better and to make sure it is best meeting your needs.

# Pat yourself on the back

Completing your planning meeting is an accomplishment. You can be proud of your self for making it this far and for standing up for your rights to live the life that you deserve.



**How are you going to reward yourself?**

A large, orange, cloud-like thought bubble with a tail pointing towards the bottom left. Inside the bubble are five horizontal black lines for writing.

# What happens next?

## Volume 3: Appealing



If you are unhappy with your plan, read Volume 3 for tips on what to do next.