

# The NDIS planning factsheet

An individualised plan is at the heart of the NDIS – it is a personalised map of how the NDIS will help the participant to work towards their goals.

This resource explains NDIS plans and gives an overview of the planning process. At the end, there is a list of other resources available that may help you understand NDIS plans further and navigate the planning process if needed.

## What is an NDIS plan?

Every NDIS participant is supported to develop an NDIS plan (also known as an individual plan). Each NDIS plan includes:

- information about the participant
- the participant's goals
- the funding they have been allocated.

NDIS plans are very individualised. They are developed based on information and evidence provided when applying to the NDIS, the person's current circumstances and their goals for the future.

Plans are developed at planning meetings – they are a collaboration between the participant and the NDIS planner, who will approve the plan.

## Planning meetings – how do they work?

There are two types of regular planning meetings – the first plan meeting, where the plan is set up for the first time, and plan reassessment meetings.

In both cases, the person's NDIS contact will communicate with the participant or their representative to arrange an appropriate time and place for the meeting. The participant can choose where and how the meeting is held, whether in person or over the phone, at an NDIA office or at another location that the participant chooses.

Participants can also choose to bring other people with them to the meeting. Trusted others can include their support worker, carer, family, or friends.

An NDIA planner will be at the meeting.

### First planning meeting

When a person gains access to the NDIS, the first step is the planning meeting.



This is usually the first opportunity to meet with an NDIA planner and discuss how the NDIS can support the person to meet their disability related goals and to assess the appropriateness of the draft plan.

At the planning meeting, the NDIA planner will present the draft plan that has been developed prior to the meeting. In developing the plan, the planner uses evidence and information collected at access stage to understand the person's

- goals and aspirations
- strengths and capacity
- supporters (e.g., informal networks, family, friends, carers or existing mainstream providers)
- disability support needs

When building the draft plan, the NDIA planner will consider what supports are reasonable and necessary to help the person meet their goals, increase independency and participate, both economically and socially, in the community.

At the planning meeting, the draft plan will be presented to the participant, and the NDIA planner will explain how the draft budget was created, how the plan will be managed, the supports included within the draft plan, and the length of the plan. The person (and their supporter, if they choose to bring them) will have the opportunity to ask questions and discuss changes that might need to be made to the plan before it is finalised.

Ideally, at the end of the meeting, the plan will be approved. However, in some situations further evidence may be required for requested changes to the plan, if this is the case the NDIA planner will explain what evidence is required and how long it should take for the plan to be finalised.

After the meeting, the NDIA will

- send the person a copy of the plan
- arrange a plan implementation meeting if the person wants one.

If required, the person's NDIS contact will support the participant to implement their plan, or connect them with a support coordinator if this has been funded in the plan. If you'd like to know more about plan implementation, you can check out our [plan activation training module](#).

### **Plan reassessment meeting**

Once a plan has been in place for a while, it needs to be reassessed and adjusted. Plan reassessments usually happen at least every 3 years, but it can be shorter depending on the person's goals and needs.

Approximately 3 months before the end of the current plan, a check-in meeting will be scheduled with the person to discuss how well the plan is meeting their needs. If the person's needs haven't changed and the plan is meeting their needs, a new plan that includes the same supports as before will be approved and sent to the person.

If the person's current plan isn't meeting their needs, or their support needs have changed, a plan reassessment meeting will be held.

While the first planning meeting is an introduction to the NDIS, and what it can offer, by the time of the plan reassessment meeting, the participant is typically more familiar with the NDIS. It is an opportunity to **review** the plan and make changes for the future.



In the plan reassessment meeting, the NDIA planner will ask about:

- **Goals:** how the participant has used their plan to work toward their goals? How this is going and if the goals need to change?
- **Supports:** what supports have been accessed? If there have been any difficulties accessing supports, which supports need to continue and which new ones need to be added or removed?
- **The participant's current needs and functioning:** the planner will usually conduct the [WHODAS functional assessment](#) to formally appraise the participant's functioning and benchmark their needs for the future.

After the plan reassessment meeting, the participant will be provided with a new NDIS plan.

## Planning for planning

A person's plan sets out their funding and supports for the future. As such, it pays to prepare in advance, so that the participant has a good idea of what they might want in their NDIS plan before the meeting starts. This section covers things you should consider when preparing for planning meetings.

LACs and existing informal and formal supporters can help with preparing for planning meetings. If existing NDIS participants have support coordination funded in their plan, the support coordinator can also help.

Useful tools to help with planning include:

- [Reimagine my life workbooklet](#)
- [NDIS participant booklet 2 – planning](#)
- [Our goal planning template](#)
- Functional assessment tools like the [WHODAS and the LSP 16](#) to identify areas of unmet need and areas of strength.

## Goals

The NDIS aims to help people to live the life they choose. So, all supports in a person's plan must link back to their goals.

Thinking about goals can be challenging and sometimes overwhelming. Participants may not have had the chance before to think about their goals, and it can be tricky to know where to start. Therefore, supporting them to think it through is important. Check out the [reimagine my life workbook](#) to help brainstorm and record goals.

Remember that goals can be big or small, long term or short term, and they can change over time. You might have a sense of the participant's unmet needs, and you can use these as a starting point for discussion, or you can help them to identify strengths to build upon.

There is no reason not to dream big in the NDIS. However, it is important to manage expectations around what the NDIS will and won't pay for. If you are not familiar with the reasonable and necessary principles, we have developed a [training module](#) which is available on our website.

When talking about possible supports to be funded, first consider *is the support best funded by the NDIS?* If yes, *what support category (or categories) is it funded under?*



If the support is not best funded by the NDIS, *who else might be able to help the person work toward their goals?* This is where knowledge of informal supports and mainstream services comes in.

### **Existing supports**

It's a good idea to take information about the person's existing formal and informal supports to the meeting as this will help the planner identify gaps and see where the NDIS might help.

A good way to gather this information is in a timetable (weekly or monthly, depending on how frequently people access services), including:

- all services a person currently accesses, such as services that will continue when the person has an NDIS plan, and any mainstream services that the person uses regularly
- any informal support provided on a regular basis, e.g., carer or friend accompanies person to a football game every fortnight, carer prepares food or cleans on a regular basis

Don't forget to include non-face-to-face time, like travel time or time spent making referrals.

### **Complexities, risks and changing needs**

NDIS plans can be flexible to allow funding and service access to change based on need.

Often, people attend their planning meetings on days when they are doing well. This is completely understandable. However, it can lead the planner to underestimate the person's support needs.

If you can show that there are times when support needs increase, this can help to ensure plans include appropriate funding.

In particular, if there are any significant risks in the future, you should make sure these are covered. Risks might include instability with informal care arrangements or housing, problems managing finances, or problems maintaining employment.

### **Support coordination**

Some participants may receive funding for support coordination. This is generally for NDIS participants who have support needs that exceed the role of a [Local Area Coordinator \(LAC\)](#).

Individual circumstances are considered when determining whether funding for support coordination is necessary, such as informal support networks, disability support needs and any other service systems involved, e.g., justice or housing.

For more information on support coordination, see our [support coordination factsheet](#).

### **Plan management**

There are three different ways that NDIS services can be paid for. Different options may suit different people, so it is a good idea to understand these in advance of planning, so that the person can discuss their preference:



- **Agency managed**  
The NDIA manages the person's plan and pays for services. If the person chooses this option, they can only use services from registered providers, who will set up a service agreement and bill the NDIA directly for supports.
- **Plan managed**  
The person pays someone (using their NDIS funding) to manage their plan for them. A plan manager will pay providers on behalf of the person – this includes registered and unregistered providers. This may be a good option for people living in regional and remote areas.
- **Self-managed**  
The NDIS will pay the person directly for the services they use. The person then uses this money to pay the providers directly. Being self-managed allows people to choose any provider, whether they are registered with the NDIS or not. The [NDIS has developed a useful guide](#) for those who want to know more about self-management.

### **Unspent funding (plan reassessment)**

If a person hasn't spent their NDIS funding, it can give the impression that the supports weren't needed. Often, however, it means that a person couldn't find the right provider or had some other difficulties finding ways to spend the funding. If this is the case, make sure it is clear why the money couldn't be spent.

### **Plan nominees**

NDIS participants can choose to have someone be their official 'plan nominee'. Plan nominees can do all the things that an NDIS participant would do, like preparing the plan, managing providers and requesting changes to the plan, if needed. This is a formal process and enables the nominee to make decisions for the person.

Alternate options for including trusted others in people's plans, while also building capacity for self-direction, are to have a list of people who can view the plan and contact the NDIA, and/or negotiate with providers on the person's behalf.

Either process can be started at the planning meeting. You can visit the [NDIS website](#) for more information on nominees.

### **What if the plan needs to change?**

Sometimes, a plan needs to change in between regular reassessment time points – the participant can request an unscheduled plan reassessment to address this. The process for reviewing a decision can be found on [the NDIS website](#).

Plan changes fit into three categories:

#### **Plan variations**

Plan variations are changes to the person's current plan without the need for a plan reassessment. Plan variations could include administrative changes, e.g., changes to a funding type from agency to self-managed, changes to the names of contact people on plans or changes to the reassessment date. These can usually be made quite quickly and easily – call the NDIA or talk to the person's NDIS contact to request these changes.

## Change of circumstance

If the person's circumstances change significantly (for example, their living arrangements, informal supports or disability support needs change), this may warrant a change to the type of NDIS services they access (Note: Changes to a person's financial circumstances alone would not be sufficient to warrant a reassessment because the NDIA does not determine support needs based on income).

## Plan not suitable

If the plan simply isn't suitable (e.g., it didn't include sufficient funding or something important was left off it), then the person can contact the NDIA within the first 90 days of the plan to request a review. Plans are unlikely to be considered for an unscheduled reassessment if

- extra funding is requested because the original funding was not managed appropriately due to, e.g., poor budgeting or misuse of funds
- the person is requesting a service or new equipment because they learned another participant has been funded for these supports
- the request can be met by informal, community or mainstream supports
- there is no new evidence to support their need for new supports.

## Provider role

A request for an unscheduled reassessment must come from the participant. However, as a provider you can play an important role in talking to people about their plans, and how their funding can be used. This can help them to make a decision about asking for an unscheduled reassessment. You may also be able to support them to contact the NDIA, depending on your role/relationship with the person.

It is important to remember the NDIS does not provide funding in NDIS plans for disability advocacy services. This means that if you are providing NDIS supports you should not provide formal advocacy services as part of this support.

It may be necessary to engage an external advocate if a person is having trouble getting the supports that they want from the NDIA. You can find advocacy providers online using [the DSS disability advocacy provider tool](#).

## Useful resources

Throughout this document, we have provided you with an overview of the NDIS planning and reassessment processes, along with some tips for planning and reassessment meetings. Here are some further training modules, factsheets, and resources, which you may find helpful:

### External resources

NDIS website

- [How the planning process works](#)
- [Using your plan](#)
- [Preparing for your plan review](#)
- [NDIS participant booklet 2 – planning](#)
- [Reviewing a decision](#)





[The Life Skills Profile \(LSP 16\) functional assessment tool training](#)  
[Reimagine my life workbook](#)

### **The CPSP Empower website**

#### Training modules

- [Support coordination in the NDIS](#)
- [Understanding NDIS plans](#)
- [Preparing for NDIS planning meetings](#)
- [NDIS plan reassessments](#)
- [NDIS plan activation](#)
- [Reasonable and necessary in the NDIS](#)

#### Factsheets and articles

- [Support coordination factsheet](#)
- [Goal planning template](#)

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