



# Instacare



## **NDIS** Planning Workbook

Independent Plan Management and Support Coordination Specialists

**NDIS Registered Provider**

This workbook is designed to assist you with the planning process for your first and subsequent NDIS plans.

What is your story and what do you want to achieve in the future?

**Instacare** is here to help you with pre-planning, plan management and support coordination.

There are several worksheets in this workbook. Feel free to use some or all to assist you in setting your goals.



 1300 002 221

 [hello@instacare.com.au](mailto:hello@instacare.com.au)

 @instacareaustralia

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## What is the NDIS and NDIA?

The National Disability Insurance Scheme (NDIS) is available for Australians up to the age of 65 who are living with a permanent and significant disability. There are certain disability or early intervention requirements which need to be met to ensure participation.

The National Disability Insurance Agency (NDIA) is the national government department that runs the NDIS.

## What is an NDIS Plan?

This is a plan for you and about you. It will include details about how you want to live, your goals and needs and funding allocated to achieve your goals.

## How does it happen?

An NDIS planner or local area coordinator (LAC) will arrange to call or meet with you (you have the right to request this as a face-to-face planning meeting), at a time and place convenient to you.

### During the meeting:

- You will discuss your life, including things you have listed in this Planning Workbook
- You will develop your participant statement
- You will set your goals and objectives
- Strategies will be developed to meet these goals
- Managing your plan – you will discuss with your planner about various options (you can choose one or a combination of the below)
  - Agency Managed
  - Self Managed
  - Plan Managed
- Coordinating services - you should discuss with your planner if you would like assistance in helping source and setup your service providers
- You and your planner will set a review date
- You may or may not require a second meeting to complete your plan

### After the meeting:

You will be sent a copy of your plan and you then need to decide how you will implement the plan. When deciding how to manage your plan consider:

- Researching service providers
- Contacting service providers
- Meeting and interviewing service providers
- Deciding which service provider will best suit your needs
- Making agreements for services or supports

You may like to consider **Instacare** to assist with this.

## Who is Instacare?

**Instacare** is an NDIS registered **Plan Manager**. The NDIS allocate additional funding to your plan separate to your therapy and other plan funds to use Instacare's services. Our goal is to reduce the pressures associated with paying your service providers and managing your NDIS plan by:

- Taking care of managing supplier payments and communication
- Processing invoices effectively and paying on time so your supports can continue
- Offering you more choice because we can pay any provider, even ones that are not registered with the NDIS
- Keeping track of your support spending to ensure you don't exhaust your plan funding over the period
- Offering you more control as we will notify you of every invoice we process

**Instacare** is an NDIS registered **Support Coordinator**. This is funded by the NDIS to:

- Support you to make the most out of your funding
- Source options for service providers relevant to your needs and goals, providing you with choices
- Assist and strengthen your abilities to coordinate supports and participate in the community
- Resolve issues, develop capacity and resilience in your network and coordinate supports from a range of services



## Get Ready Checklist

- Find out when the NDIS will be in your area, [www.ndis.gov.au](http://www.ndis.gov.au) or call them on 1800 800 110.
- Check your eligibility for the NDIS – complete My Access Checklist [www.ndis.gov.au/ndis-access-checklist](http://www.ndis.gov.au/ndis-access-checklist) or make an access request on 1800 800 110.
- Once confirmed eligible you should be contacted by a Local Area Coordinator (LAC) or NDIS Planner to start your transition to an NDIS plan.
- Complete this workbook to help you look at your current activities and supports and what you would like to achieve or change for the future. Remember:
  - Start now
  - Think big
  - Write a list – think about day to day activities
  - Be specific
  - Get onto the paperwork – **Instacare** can help with this
  - Get your supporting documents ready (eg. allied health plans, copies of recent assessments, supporting letters, confirmation of diagnosis of disability from your GP or specialist and reports of your support needs)
  - Consider taking an advocate/support person with you to the planning meeting
- Think about your goals, the following worksheets are to help with this process. The NDIS will record **2 main goals** on your plan, plus a longer term goal and aspiration.
- Meet with your appointed LAC or NDIS representative who will help you develop a plan specifically to suit your needs.
  - Be prepared, take this completed workbook and above listed support documents
- Your plan will provide you with individualised funding for you to control how it is used.
- At the planning meeting, let the planner know if you would like a plan manager (such as **Instacare**), the NDIS will allocate additional funding for this service above your services budget.
- At the planning meeting let the planner know if you would like **Instacare** to be a support coordinator, then this can be added to your plan. Please note - If you need one, it is at this meeting you need to nominate a support coordinator.
- Once the plan is finalised, the NDIS will provide you with your approved plan and then you'll be ready to put it into action.

## Sample NDIS Plan

We think it's important for you to see an NDIS plan before completing this book, so we have a sample plan below. Please note, prices may vary, and although de-identified, the responses are based on real approved NDIS plans.

The budget for your plan is broken into three Support Purpose categories: core, capital and capacity building:

1. CORE - A support that enables a participant to complete activities of daily living and enables them to work towards their goals and meet their objectives.
2. CAPITAL - An investment, such as assistive technologies - equipment, home or vehicle modifications, or for Specialist Disability Accommodation.
3. CAPACITY BUILDING - A support that enables a participant to build their independence and skills.

### Example 1 - SALLY EXAMPLE's National Disability Insurance Scheme (NDIS) plan

**Name:** Sally Example

**NDIS Number:** 430000000

**Plan starts:** 1<sup>st</sup> July 2018

**Plan will be reviewed by:** 1<sup>st</sup> July 2019

The National Disability Insurance Agency (NDIA) will contact me about my plan review before the review date.

**I will tell the NDIA when something important changes (or is going to change), like moving house, starting work or school, or if my goals change.**

**If I have any questions, or if my circumstances change, I can contact the NDIA in any of the following ways:**

- Telephone NDIA on 1800 800 110
- If I use a TTY, phone 1800 555 677 and ask for 1800 800 110
- If I use Speak and Listen (speech-to-speech relay), phone 1800 555 727 and ask for 1800 800 110
- If I use the National Relay Service, visit their website at <http://relayservice.gov.au> and ask for 1800 800 110

## Part 1: About Me

This part of my Participant Statement is about me, my daily life, and the people in my life.

### **Where I live and the people I live with**

I am aged 13, live with Mum and Dad and my older brother James who is 18, but he might move out of home soon and go to university.

### **People in my life who support me**

Mum and Dad help look after me with my everyday needs including personal care, hygiene, communication and accessing the community.

### **My daily life**

I attend my local primary school where there is an aide (Barb) who helps me at school. She helps me get to areas which are difficult in my wheelchair and helps me with organising my schoolwork and going to the toilet. I get to and from school in a maxi taxi. At school, I enjoy swimming and drumming classes.

## Part 2: My Goals

This part of my Participant Statement lists my goals and what I want to work towards during this plan.

**My First Goal is:** To be able to feel comfortable in my wheelchair and be able to get myself around more on my own.

During this plan I want: NDIS to fund a wheelchair assessment and a new wheelchair based on my changing needs. I have out grown my old chair and it's quite heavy to push myself around. I would like to be able to get into my backyard on my own, at the moment there are steps which I can't get down myself and I always have to ask Mum, Dad or James for help.

**My Second Goal is:** To learn how to play tennis. I have heard about wheelchair tennis and if I can get a new lightweight wheelchair I would like to learn how to play tennis.

During this plan I want the NDIS to fund wheelchair tennis lessons and fund the transport to get me there and back. It's hard for Mum or Dad to have time to get me there on the weekends.

### **My longer term goals and aspirations are:**

Goal: I want to be able to finish school and go to university just like my brother will.

Goal: I want to be involved in sport as much as possible and maybe even work in the sports industry one day.



## Part 3: My Supports

These are the supports that will help me to work toward my goals.

### Family and friends

These are who the NDIS calls 'informal' supports.

### My informal supports

My Mum and Dad are my primary carers and help me with activities of daily living, particularly daily care needs.

These supports might include things like health or mental health services, schools or education services, community groups, sporting or hobby clubs or other government services. These are what the NDIS calls 'community and mainstream' supports.

### My community and mainstream supports

- Barb – Teaching aide
- Maxi Taxi

### NDIS reasonable and necessary support budgets

I can choose how I spend the amount in each budget listed below by checking the NDIS price list and the matching supports on the NDIS website participant page [www.ndis.gov.au/participants](http://www.ndis.gov.au/participants)

Where a support is listed in my plan as 'stated', I must purchase this support as it is described in my plan. I cannot swap 'stated' supports for any other supports listed in the price list.

<b>Support Area:</b>	<b>Improved daily living</b>
<b>Budget:</b>	\$1,053.00
<b>Details:</b>	Funding for an allied health professional or therapist to assess and provide support in assisting you to meet your goals of skill development and improving your daily routines/behaviour/support/mealtime management/communication/understanding your sensory needs. Supports to work together within the home and community settings, utilising relevant disciplines to meet the plan goals and objectives. Funding includes any personalised training necessary for using implementing strategies to provide your safety in the home.
<b>How will the supports be paid:</b>	NDIS will pay my plan management agency directly for these supports.

<b>Support Area:</b>	<b>Transport</b>
<b>Budget:</b>	\$2,651.00
<b>Details:</b>	This funding is a contribution towards any transport related costs you incur during the plan period. This amount will be paid fortnightly into your nominated bank account on a pro-rata basis.
<b>How will the supports be paid:</b>	NDIS will pay me directly for these supports.

## NDIS reasonable and necessary support budgets continued

<b>Support Area:</b>	<b>Core supports</b>
<b>Budget:</b>	\$7,243.00
<b>Details:</b>	Core supports are to assist with undertaking activities of daily living. This typically includes self-care and community participation. Funding in this budget also includes, if required, assistance with domestic activities/supports to sustain informal networks/group or individual community access supports. The supports are flexible and allow you to allocate your funding to purchase services that will assist you to meet your plan goals. Funding has been included in this category for social, community and civic participation including group based community, social and recreational activities.
<b>How will the supports be paid:</b>	NDIS will pay my plan management agency directly for these supports.

<b>Support Area:</b>	<b>Assistive Technology</b>
<b>Budget:</b>	\$4,318.00
<b>Details:</b>	STATED: Funding for your assistive technology to be considered based on recommendation submitted from a relevant practitioner to NDIS (that is a completed assessment and a relevant quote). This recommendation will be considered against the reasonable and necessary consideration [Quote Required]. Wheelchair [quote required] Portable ramp [quote required]
<b>How will the supports be paid:</b>	NDIS will pay my support provider directly for these supports.

<b>Support Area:</b>	<b>Improved Life Choices</b>
<b>Budget:</b>	\$1,395.71
<b>Details:</b>	Financial intermediary - set up costs. Financial intermediary monthly processing 12 months.
<b>How will the supports be paid:</b>	NDIS will pay my support provider directly for these supports.

<b>Support Area:</b>	<b>Support Coordination</b>
<b>Budget:</b>	\$3,386.16
<b>Details:</b>	Assistance to strengthen your ability to coordinate and implement supports, strengthen your informal network and coordinate a range of both funded and mainstream supports. 36 hours.
<b>How will the supports be paid:</b>	NDIS will pay my support provider directly for these supports.

## Activity tracker

This section helps you to think about your current activities and what support you need. It's helpful to think about what you do and what you would like to do early, so you are ready when the NDIS is in your area.

When filling out the tables think about all of the things you do now – not just at a day program, school or work, but things you do across the whole day and week. There is a spot to make notes about things you would like to change, do more of, or stop doing.

## Weekly regular activity tracker

Other tables are for the things you do regularly – these are things that have a routine or schedule. For example, going to school or work, or perhaps going to leisure activities, if you do these at the same time every week. You might also have regular times when you catch up with family or friends or go to clubs or organised activities.

## Occasional activity tracker

There is another table that you can use to make some notes about things you do occasionally. For example, at certain times of the year (attending the AFL) or sometimes (visiting zoo) or things you like to do with loved ones (holiday).

When listing these activities think about how you get to places, supports you need before, during or after an activity, or any specific things you may need support for (personal care, meals).

It could be a good idea to get people who provide you with support, to write a description of how they support you (organising tickets to the theatre or planning involved).

You may or may not use all the tables, but they are there if you wish to use them to assist you in creating your goals for the next 6 - 12 months.

## Weekly regular activity tracker

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
What I do now							
What I would like to do							
Support I need							

## OCCASIONAL ACTIVITY TRACKER

	<b>What I do/how often</b>	<b>Support in place</b>
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		

## Support Category Record

What supports are you using now?

Type of support	When do you need it?	Who pays for it?

**What supports would you need in the future?**

Type of support	When will you need it?	How much will it cost?

## Equipment Review

Consider your current equipment and how it is working at the moment. This may prompt you to think about how it could be improved in the future.

	Type of aid/equipment	Is it working?	What does it help with?	What needs to happen to the equipment?		
				Replace / New?	Repair?	Service?
Mobility						
Communication						
Self Care						
Access						
Environmental Control						
At Work						
At School						
Continence						
Other						



# GOALS

Now looking at all these supports and aids/equipment (capital supports) in the **Activity Tracker** together with the **Support Category Record** and the **Equipment Review**. Think about how you are currently living, what's important to you and the life you want to live, what are your main goals?

The NDIS plan is based on 2 goals and your longer term goals and aspirations.

List the goals you have identified here:

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What are your two major goals for the next 12 months and your long term goals and hopes.

My first goal:

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My second goal:

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My long term goals and hopes:

.....

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.....

Now that you have done some work on your plan you are ready to meet with the NDIS planner for your planning discussion.

**Instacare** is happy to help and support you in getting ready for the NDIS. We are here to answer your questions and give you choice and control.

Instacare is registered by the NDIS to provide Plan Management and Support Coordination services.

As **Plan Managers** we can:

- Save you hours a week without the hassle of paperwork
- Pay any provider (including registered and non-registered NDIS providers)
- Manage supplier payments and communication
- Help to plan your budget and monitor your spending
- Provide a more personal approach, no long calls to the NDIS


As **Support Coordinators** we can:

- Identify a number of mainstream, community, informal and provider options that are best able to meet your needs
- Negotiate services to be provided and their prices, develop service agreements and create service bookings with preferred providers

Once your plan is approved we are here to help you implement it as your plan manager and/or support coordinator. Be sure to request the use of a plan manager and/or support coordinator in your planning meeting, and specifically what you need help with from the above list so funds can be added/allocated for those services.

**Instacare look forward to helping and guiding you on this journey so you can meet your goals and aspirations.**

For further information, please contact us.

 **1300 002 221**

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If you need language support contact the Translating and Interpreting Service (TIS) on 13 14 50





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