

Preparing for the NDIS: Your Checklist

Your NDIS planning meeting is your chance to choose the services and supports you get and, if you want, to make some big changes. In this meeting, your Local Area Coordinator (LAC) will ask you to tell them your hopes and goals for now and for the future, so that together you can work out what supports you need.

It's important to be prepared for such a big conversation, so we've prepared this checklist to help you work out what you want from the NDIS.

A few tips for completing this list

- **Think "magic wand".** What could you achieve if only you had the right supports?
- **Take your time.** These are big questions and can't be answered in a hurry.
- **Talk it over.** Share your answers with someone who knows you well to get their input.

We realise there's a lot to think about, so feel free to contact us any time if you have any questions. Simply call our friendly team on 1300 333 700 or send us an email info@planpartners.com.au



My life and supports now

Before sitting down to write your goals, take a moment to think about what life is like for you right now. What's going well? What could be better? Who are the people in your life and the supports you use currently? Answering these questions will help you to establish what's missing or needs to change.

1. What does your day-to-day routine involve? (For example, what are the main activities you do every day/regularly? Do you have any regular appointments or commitments?)

2. What do you like doing? (You can list your hobbies, interests and any social events or outings you enjoy. Remember, this list can also include things you'd like to do more of, or don't currently have the chance to do at all)

3. What are your current health concerns and challenges? (For example, do you have health challenges that prevent you from doing things you enjoy or limit your independence?)

4. Who are the people who support you in your daily life? (This might include family members, friends, support workers, your GP or other service providers).

5. What kind of supports and services do you currently receive? Here's a list to help make sure you think of them all:
 - General health:
 - Mental health:
 - Equipment/occupational needs:
 - Therapists:
 - Personal Supports:
 - School/Education/Employment/Housing:
 - Community Groups/Community Access:
 - Sports/Hobbies:

6. Looking at the supports and services you've listed, are there any things missing or that you'd like to change? (Remember, there are no limits to your wish list, so be sure to include everything you would like.)

My goals

The NDIS is designed to help you realise your goals in life. That's why we encourage you to think really carefully about what you want to achieve, not only now but in the future. Try and think 'big picture'. Imagine what your life could be like if you had the right supports to deal with some of the day-to-day challenges you face.

1. Think of your life in 5 or 10 years. What would you like to have achieved? Where would you like to be?

2. Try to write at least one long-term goal for each of these categories:
 - Living situation (for example, living independently)

 - Health and wellbeing (for example, personal training or advice on managing your diet)

 - Social, relationships and community (like making new friends or becoming more active in your community)

 - Education and employment (such as doing further study or finding a job)

 - Any other goals that are important to you

As NDIS plans generally cover a 12-month period, you might need to break your long-term goals down into short-term goals. Think about what you want to achieve in the first year (or, if you're planning for a review, in the next year of your plan).

3. With this in mind, what are your top 3 goals for the upcoming year? (For example, if your long-term goal is to find a job, a short term goal might be to learn a new skill to make you more employable)
 - 1.

 - 2.

 - 3.

My NDIS Plan Management

With the NDIS, you get to choose exactly how and when you spend your funding as well as who you spend it with.

Because there's a lot more planning involved than the previous system, you can ask for **Plan Management** to help you manage your NDIS funds. Your Plan Manager can make sure your service providers are paid, claim from the NDIS and keep track of your paperwork and spending. If you want this service, make sure you ask for it in your meeting. It's available for everyone who asks for it.

You may also be eligible to apply for a **Support Coordination**. A Support Coordinator is someone who can help you find and connect you with the right supports to suit your individual situation and goals. This can be particularly helpful if you have a number of supports and providers to juggle. Not everyone is eligible for Support Coordination. Make sure you tell your LAC that you want it, and why, and they will help you work out if you're eligible.

1. How would you like to have your plan managed financially?

By a Plan Manager (Plan Management)

A quick reminder: if you ask for Plan Management in your meeting, the NDIS have to put it in your plan. You'll receive funding for this in the category 'Improved Life Choices'.

By myself (Self Management) – You take care of choosing and paying your providers.

By the NDIA (NDIA Management) – You are limited to registered providers only.

You can read about each fund management option in more detail on our website planpartners.com.au.

2. Do you think you need Support Coordination (that is, support with finding and organising your service providers)?

Yes No

If yes, please describe why you think you need Support Coordination?

Notes

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