

## YOU are the expert on your family member

As you know your family member best, you are best placed to know what is important in their life and how they are best supported.

So...

- Have confidence when you shape the plan.
- Do not underestimate your [natural authority as a family](#).
- Stand your ground.

## Get help from others

To broaden your ideas, enlist the support of family and friends for input.

- What do others think is important to your family member?
- What do they consider are their interests/hobbies?
- What do they think would be meaningful in their daily lives?
- One helpful strategy may be a **circle of support**.
- [This video shows what can be achieved with the help of a circle of support](#).



## Having a positive vision

A good place to start when preparing for an NDIS plan review is to prepare or review a positive [Vision Statement](#) for the participant.

- A Vision Statement is a personalised resource carefully planned with and around your family member.
- A documented positive Vision Statement will support the making of life choices and decisions, enabling you to clearly communicate the values and expectations you believe are necessary to create a good quality and typical life for your family member.
- A Vision Statement can strengthen NDIS goals, plan preparation and direct formal support choices. It provides a powerful reference when identifying goals for the NDIS plan.
- Have goals that result in clear, positive outcomes and are in line with the Vision Statement.

## Think of valued roles that your family member can have and how they can be supported



The original design of the NDIS is to 'support the independence and social and economic participation of people with disability.' Take advantage of this great opportunity.

For example, if your family member loves soccer, find a way for them to become a member of their local soccer club or favorite professional club.

For more ideas:

- Visit the [Resourcing Inclusive Communities website](#)
- Watch [Tailor Made: A life as individual as you](#) video

## Choose to self-manage for greater flexibility and control

Self-managing your family member's plan is your choice and gives you maximum flexibility.

You have a right to self-manage an NDIS plan outright if you want choice and control over services, but if you need help with administration, you can choose to part self-manage and part plan manage.

This is a right, not something you have to prove you can do. See [this animated clip](#) from the NDIS. If you are being questioned by the Local Area Coordinator, be assertive (but not aggressive) about your 'choice'.

**Tailor the plan** to your family member's needs specifically.

Be able to explain why each goal is important - that is, why it is a reasonable and necessary support in your family member's life. You may need to clearly justify why something should be included in your family member's plan.

For example, Sarah's goal was to have extra reading support as it is an important communication life skill and helpful when learning vocational skills for future employment. Sarah received funding for a communications mentor to help her achieve this goal.

Ordinarily, this would be viewed as being in the domain of the Department of Education, but it was linked to her goal and she could justify why it was important for communication across many areas of Sarah's social, community and employment needs.

## Speak 'NDIS language'

NDIS planners need to make a case for every support they include in a plan. To clearly communicate your family member's support needs it is helpful to understand the NDIS terminology and focus on outcomes of the requested supports. [Getting the language right](#) can result in better supports for your family member.



**Effective from July 2022**, the NDIS language used for changes to plans is referred to as a '**plan variation**' for less significant changes and for more significant changes a '**plan reassessment**'.

Plan variations can be requested by a participant or on the NDIA CEO's own initiative. Every plan

variation, regardless of who initiated it, must be prepared with the participant and or the participants Nominee.

Reasons for a plan variation are:

- To correct a minor or technical error.
- To change the reassessment date of the plan or to deal with those changes.
- If there needs to be a change to the statement of participant supports in relation to managing the funding of supports or other aspects of the plan.
- To make a change to an existing stated support to reflect a different provider or manner of support provision.
- If the participant requires crisis or emergency funding as a result of a significant change to the participant's support needs.
- If the NDIA receives new information in response to a request for information that had previously been made (e.g., assistive technology or home modifications); or
- If a minor variation is required to increase the funding of supports in the plan.

The NDIA has 21-days to respond to a plan variation request by either varying the plan, deciding not to vary the plan or informing the participant that NDIA need more time.

When a plan is varied the NDIA will provide the participant with the new varied plan within 7-days.

When support needs change significantly you can request a [plan reassessment](#).

The term review is now exclusively referring to formal internal reviews (S100) by the NDIA and external reviews by the AAT(Administrative Appeals Tribunal).

[The NDIS guide to Self-Management](#) is a fundamental document for participants or plan nominees who choose to self-manage their plan, self-managed participants are not bound by price limits or line items, claims are made by Support Categories.

[The NDIS Price Arrangements and Price Limits](#) are in place to ensure that participants receive value for money in the supports they receive.

[NDIS Participant Planning Workbooks](#) can assist with the planning process, we also suggest you follow our 10-step guide when preparing for your family member's planning meeting.

## 10 Step NDIS Planning Guide

**Our 10 Step NDIS Planning Guide** is designed to assist families not only prepare for planning meetings but also plan for a meaningful life for their family member.

These 10 steps are fundamental in the NDIS planning process and can be used alongside [three NDIS workbooks](#): *Understanding the NDIS; Planning and Using your NDIS plan*.

# NDIS PLAN TIPS



## Step 1

Prepare a [Positive Vision Statement](#).

## Step 2

Write goals that align with your Vision Statement and are broad enough to give you flexibility and opportunity to experience new things in life.

## Step 3

Prepare a 2-week diary of all activities including formal and informal support needs. Identify the areas critical to achieving a meaningful life and link to the NDIS goals, ensuring you consider any night support or random ad hoc support needs.

## Step 4

It is important for all your capacity building supports (Therapists/Allied Health supports) to collaborate as a team to ensure a planned approach and ensure all their evidence and reports align not only with each other but with your vision and NDIS goals. Find creative, enjoyable ways to achieve outcomes that link to goals.

A collaborating team should work towards finding everyday solutions and better outcomes focusing on a [social model](#) rather than a medical model. In most cases capacity building supports are most successful when they are embedded in everyday life activities rather than in clinical environments.

Ensure your reports include evidence of what worked and did not in previous plans. Identify any barriers and what is needed to overcome these barriers in the new plan. A financial quote should be provided for both face to face and non-face to face support needs including travel during the [10 steps to excellent NDIS Therapy reports](#).

## Step 5

Prepare a list and financial quotes for [core budget consumables](#) and capital budgets for [Assistive Technology](#) and [Home Modifications](#) as well as any equipment that requires [maintenance repairs or replacement](#). Ensure relevant reports, assistive technology request forms, building consults and quotes are provided which link to the plan goals.

## Step 6

Write a statement of [disability lived experience](#) (person with disability) and/or [carer impact statement](#).

Using the [Independent Advisory Council's report](#) to the NDIS you will be able to identify the participants disability support needs compared to the needs of their same aged peers who do not live with disability.

A Planner or LAC usually have no connection with you, they do not know your life or the positive or negative things that impact you. Participants, this is where you can tell your story and vision of what is important for you and it is also an opportunity for families to tell their story in a positive way that talks to your family member's needs, vision, what is important to and for them, the supports they need to be valued and safeguarded, but also allows for the dignity of risk to enjoy a good life.

Families can also talk to how they can be supported in sustaining their informal support role. Both participants and families can highlight the risks, how they can be mitigated and also talk about the good things.

## Step 7

List the funded support needs and identify why each support is most appropriately funded by the NDIA by addressing the 6 reasonable and necessary criteria listed in our [reasonable and necessary flowchart](#).

This should be a helpful tool to clearly identify needs and assist the planning process because you know your family member best and are best placed to provide a summary.

\* An example table of how to document this information is overleaf.

## Step 8

Provide a listed summary of all supporting documentation and keep records of when and how you submitted it.

Regardless of all the documents you are providing, we recommend you provide a summary linking requested supports with the plan goals, the reports, all other evidence and the reasonable and necessary criteria.

LAC's and Planners who are not familiar with your family member's needs should be able to clearly map and link the support requests to the evidence. It may be worthwhile contacting the NDIA to ensure all evidence you forwarded has been received and attached to your family member's NDIS file.

## Step 9

Send the Vision Statement a few weeks prior to your meeting to give the Planner or LAC time to read it. At your planning meeting you can discuss the Vision Statement to see if they have read it or not. If they have not read it you should give them time to read it before commencing the meeting.

## Step 10

Reflect on the participant's voice at all levels of this process and ensure their voice is clearly identified using strengths based language.

# NDIS PLAN TIPS

\*Example

**14-year-old with an intellectual disability**

	<b>Funded Support requested:</b>	<b>Funded Support requested:</b>
	<i>Example:</i> Exercise physiology every 2 weeks.	
<b>Why is the support effective and good practice?</b>	E.g. recommendations made by Allied Health or Medical specialists as per best practice (specify details related to disability needs). Also include history of what worked previously.	
<b>How will the support assist me to achieve goals and aspirations?</b>	E.g. Goal 2. I would like to improve and maintain my health and wellbeing. Goal 3. To maintain muscle memory and strength to build everyday independence. I will be supported to build and maintain my fitness, my mental health and emotional self-regulation.	
<b>How will the support assist me to participate socially and economically?</b>	Building and maintaining my stamina will assist me in preparing for post school life and building my independence.	
<b>How does the support represent value for money?</b>	It is cost effective allowing active participation in building and maintaining my fitness safely and reduces my intensive therapy needs.	
<b>How does the support take into consideration what is reasonable for families to provide?</b>	As a 14-year-old it is age appropriate to build independence and responsibility for one's own wellbeing independent of family.	

# NDIS PLAN TIPS

<p><b>Why is the NDIS the most appropriate funding body for the support?</b></p>	<p>E.g. This support is specific to the disability need and not funded by other service systems. <i>You can also list why it is not appropriately funded by other service systems.</i></p>	
<p><b>Link supporting evidence provided for the request</b> E.g. report title, page paragraph</p>	<p>E.g. reference Physiotherapist and OT or EP report.</p>	

## Once you receive your plan, shop around

Remember you and your family member with disability are now in the driver's seat, with all the rights that come with being a consumer. It is suggested that you have a Service Agreement in place when you engage a Service Provider. A Service Agreement is exactly that, an agreement between you and the provider. You can collaborate with the provider to identify the terms. Refer to our [NDIS Service Agreement Guide](#).



If you are unhappy with your service provider refer to their complaints/feedback guide within the Service Agreement and follow through with this process, letting them know directly and try to work in partnership to solve things internally first. If this does not work and they are breaching the [NDIS Code of Conduct](#) or the Service Agreement in place on behalf of your family member, you have the right to report the service provider to the [Department of Fair Trading](#) and the [NDIS Quality and Safeguards Commission](#). Push back as a consumer and demand you receive the service you agreed to. We have prepared a [troubleshooting guide](#) for you. The more people that hold service providers accountable, the better off the market place will be.

If your needs or circumstances change you can apply for a reassessment.

**If you are unhappy** with your family member's plan and the decisions made by the NDIA you can request an internal review (S100) [NDIS review](#).

## Keep developing your family member's NDIS goals with each new plan

Revisit planning ideas to continue to improve and nurture the vision and goals for your family member. For example, in the first year of his NDIS plan, Jason had a goal of being able to live independently in the future. He started a part-time lawn mowing business on the weekends as he is still at school. In the second year of his NDIS plan, Jason has a goal to expand his business and has requested a business mentor to support him to achieve this new goal and further develop his role as business owner.

# NDIS PLAN TIPS

## Hot Tips



- Planning Meetings can be in person, over the phone or via video link. Our [Advocacy Tips and Tools](#) can support you in conducting effective meetings strategies.
- Build your skills in [Supported Decision Making](#) with this online learning resource. Using this framework will help you enable your family member to exercise choice and control in their own lives and take agency directing their vision, goals and in how their supports are provided.

## Contact us

### Family Advocacy

**Phone:** 02 9869 0866 or 1800 620 588

**Email:** [communications@family-advocacy.com](mailto:communications@family-advocacy.com)

**Web:** [www.family-advocacy.com](http://www.family-advocacy.com)