

National Disability Insurance Scheme (NDIS) Pre-planning booklet



Date:

Name:





Queensland:
PO Box 3356, South Brisbane QLD
4101

New South Wales:
PO Box 698, Epping NSW 1710

Freecall: 1800 673 074

F: 07 3137 7452
E: info@synapse.org.au
W: synapse.org.au

NDIS Pre-planning booklet is produced by Synapse.

Synapse is dedicated to improving the quality of life of people living with and affected by neurocognitive disability, or people whose behaviour challenges our understanding.

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booklet?
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1800 673 074
info@synapse.org.au**

Using this booklet

Now you have been accepted into the National Disability Insurance Scheme [NDIS], a representative from the NDIS will make contact with you or your nominated support person to set up a planning meeting. This meeting will be to discuss your goals, and the supports you require for the next 12 months.

This booklet is designed to help you, your carer, family or friends to work through what your goals are for the next 12 months and beyond. It will help you identify what supports you currently have and would like to keep, and what supports you would like to introduce to help you reach your goals. You may choose to share this booklet with the NDIS representative at your planning meeting.

If you are unsure of any terms used in this booklet, you may find the definition in the glossary on page 25.

You don't have to complete the booklet in one go, you can break it into sections and work at your own pace.

What can the NDIS help me with?

Based on your goals and needs your NDIS representative will create a unique NDIS plan to help you access the right supports and services for you. A NDIS plan is how your disability funds are allocated for the reasonable and necessary supports you need to enjoy an ordinary life. An ordinary life is that which enables you to exercise choice and control in pursuit of your goals, and the planning and delivery of your supports. Support may be one-off, such as modifications to your home, or purchasing modified equipment to help you live as independently as possible i.e. kitchen utensils, or bathroom furniture. It can also be ongoing support which can provide assistance to try new activities, develop new friendships and explore your world.

The NDIS has three main support budgets that your plan will have funds allocated to. Your plan will only contain the supports you need, so you may not have every budget in your plan. Supports must be related to your disability and take into consideration any supports you receive through other government programs such as health and education services.

What are the three support budgets?

1. Core provides funding for support to complete activities of daily living such as shopping, cooking, cleaning and getting out and about in the community. This funding is flexible across this budget, but cannot be transferred to Capital or Capacity Building budgets.

2. Capital provides funding for assistive technology to help with everyday life activities, for example smart technology applications. This budget can also fund home modifications. This funding is not flexible across this budget, and cannot be transferred to other budgets.

3. Capacity Building provides funding for support that help to increase independence. This includes support to find suitable housing, find a job, improve relationships, health and well-being and daily living skills. For example, learning to manage money or catch public transport. This funding is not flexible across this budget, and cannot be transferred to other budgets.



About me

Living arrangements (type of accommodation, address, and who you live with)

Your ideal living arrangements if different from above (type of accommodation, location, and who you live with)

My supports

Informal support (unpaid support) e.g. parents, cousins, community groups, Synapse

Formal support (paid support) e.g. occupational therapist, personal trainer, dance classes

Mainstream support e.g. Centrelink, Department of Housing, Disability Employment Services

Do you have a guardian or have you been appointed a Public Guardian?

Yes

No

Do you have a financial administrator or have you been appointed a Public Trustee?

Yes

No

Do you want someone to act on your behalf with the NDIS? (plan nominee)

Yes

No

**Have a question?
Contact Synapse**
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My goal

A description of my goal:

e.g. I would like to find a part time job this year

e.g. I would like to attend more social events during the year

What can I do in the next 12 months to work towards my goal?

e.g. complete a job assessment with an occupational therapist

e.g. try out some new activities such as gardening or cooking

What help or equipment (assistive technology) will I need to achieve my goal during the next 12 months?

e.g. help from an occupational therapist

e.g. help from a support worker to take me to new activities and attend with me

e.g. kitchen aids such as adapted utensils, non skid dinnerware, and timers

Is this one of my two most important goals for the next 12 months?

Yes

No

If no, is this a goal I can look at in the future?

Yes

No

My current week

Add the usual activities you do during an average week to the table below. If you need support or prompting to complete an activity, place a tick in the column next to the activity. Think about your daily and evening routines, activities such as work, study, and sport. Do you have any regular social group outings? Do you have any allied health visits or medication preparation needs? Don't forget to add your transport needs. If you don't have a set routine, you may prefer to list the activities you do during a usual week on the next page.

	Monday	✓ Tuesday	✓ Wednesday	✓ Thursday	✓ Friday	✓ Saturday	✓ Sunday	✓
6 am								
7 am								
8 am								
9 am								
10 am								
11 am								
12 pm								
1 pm								
2 pm								
3 pm								
4 pm								
5 pm								
6 pm								
7 pm								
8 pm								
9 pm								
10 pm								
11 pm								
12 am								

My current week activities listed

A current week with new activities related to goals added - example only

The areas in green have been added to make this current week an ideal week.

When support or assistance is needed to undertake a task, a tick is placed in the column next to the activity.

	Monday	✓ Tuesday	✓ Wednesday	✓ Thursday	✓ Friday	✓ Saturday	✓ Sunday
6 am	get dressed						
7 am	go swimming at local pool	get dressed	get dressed	get dressed	get dressed	get dressed	get dressed
8 am	have breakfast at pool cafe	have breakfast	have breakfast	have breakfast	have breakfast	have breakfast	have breakfast
9 am			attend community gardening group		occupational therapy at home		
10 am	go to library	go to speech therapy		visit mother		help clean house	go out with sister
11 am							
12 pm		go to cafe for lunch	go to cafe for lunch		have lunch		
1 pm				have lunch		have lunch	have lunch
2 pm	rest	rest	rest	rest	rest	rest	rest
3 pm	volunteer at homework group		volunteer at homework group	learn how to use public transport		community outing	cooking and baking
4 pm	volunteer at homework group	gym			gym		
5 pm							
6 pm	eat dinner	eat dinner	eat dinner	eat dinner	eat dinner	eat dinner	go out with friends for dinner
7 pm		go to the movies					
8 pm	watch tv		watch tv	watch tv	watch tv	go out with friends	
9 pm							
10 pm	go to bed	go to bed	go to bed	go to bed	go to bed	go to bed	go to bed
11 pm							
12 am							

My ideal week

Now add your usual activities in a week you would like to continue, along with any activities and interests that you have identified to help you meet your goals in the table below. Ideas include: new therapies such as occupational therapy or psychology. You may like to look at some new activities to try such as gardening or cooking. You may like to learn a new life skill such as catching public transport or doing the grocery shopping. If you're not sure where your ideal week activities may fit, you can list them on the next page.

	Monday ✓	Tuesday ✓	Wednesday ✓	Thursday ✓	Friday ✓	Saturday ✓	Sunday ✓
6 am							
7 am							
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							
7 pm							
8 pm							
9 pm							
10 pm							
11 pm							
12 am							

Ways to manage your NDIS money: how to pay your supports

There are three ways your supports can be paid:

1. Financial intermediary is where you receive funding in your NDIS plan to pay a provider to manage your invoices and payments for services and purchases.

2. NDIA managed is where the NDIA pay all your invoices directly to your chosen providers. This is also referred to as agency managed.

3. Self managed is where the NDIA has appointed you or your nominee to manage your own plan. You are responsible for paying your invoices and managing your funds.

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Feature	Financial Intermediary	NDIA Managed	Self Managed
No cost to you	yes	yes	yes
Can I use NDIS registered providers?	yes	yes	yes
Can I use providers who are not NDIS registered providers?	yes	no	yes
All invoices paid for you	yes	yes	no
Paperwork kept and organised for you	yes	yes	no
Option to help track your spending	yes	no	no

How can Synapse help you?

NDIS Support Coordination can help people bring their NDIS Plan to life. Synapse can assist NDIS participants to establish service agreements with providers that will best meet their needs. Synapse works alongside individuals to build their capacity and help achieve their goals.

NDIS Financial Intermediary supports those actively participating in the NDIS by acting as a financial intermediary between their service providers and the NDIS. Synapse can take the stress out of managing package funds, coordinating services, and managing payments. Individuals can take as much or as little control as they like in monitoring their budget.

NDIS Appeals provides assistance to people that have concerns regarding decisions made by the NDIS about their access to the scheme or the contents of their plan.

Advocacy can help people with brain injury ask for more suitable services, support them at important meetings, help to make a complaint, raise a dispute about their supports, or represent their needs with organisations. For example, government agencies, service providers, or hospitals.

Information and Referral is a service that responds to enquiries on issues relating to brain injury. All enquiries are directed to a qualified staff member who listens to the concerns of the individual, discusses the types of assistance that may be appropriate, then facilitates access to support or information.

Friends of Synapse is the way to connect with Synapse news. By signing up as Friend of Synapse, a person will receive regular updates through Synapse eConnect news, publications and event invitations. Friends will also receive updates on existing and new Synapse services.

Publications

Synapse produces the following publications to provide information for individuals, family members, friends and other professionals:

- Bridge magazine is published twice a year featuring practical strategies, news, research, and stories.
- Acquired brain injury: the facts is a comprehensive guide to brain injury.
- The Synapse website also features a range of fact sheets and personal stories.

Reconnections offers the opportunity to create personal networks and the sharing of experiences between individuals with brain injury. Synapse also offers people with brain injury to connect in a safe, supportive context via the Reconnections Facebook group.

Training aims to improve broader community capacity and understanding of brain injury.

Synapse can deliver seminars, workshops, guest speakers or video conferencing on a range of topics including; understanding and responding to acquired brain injury and challenging behaviours.

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Pre-planning checklist

This list is designed to help you finalise the process of pre-planning. For each step, read the writing in the blue section for tips on how to complete the step. Once you have completed a step, tick the box and move to the next.

I have determined who my supports are

Have a look through the booklet.
Have a look at the definitions for supports in the booklet.

I have worked out what my week looks like

Have a look at the booklet on pages 16 to 20.
Fill in everything you do for a week.
Make a note of what things you do that you would like to do more of - like socialising, or sporting activities.
Make note of any support you need with any of the activities you would like to do in an ideal week. Don't forget transport.

I have identified my goals

Think about some goals you would like to achieve over the next 12 months and some longer term goals.

I have found information and support

If possible, go to a pre-planning workshop.
Talk to others who are going through the pre-planning process too.
Contact Synapse information and referral to find out if there is a workshop near you.

I have seen a pre-planner (optional)

Bring copies of your medical assessments, documents and any letters from the NDIS.
Bring in the work you have done with your booklet.
Ask as many questions as you like.
The pre-planner will turn your goals into NDIS language that will help get the supports you would like and summarise this into your participant statement.

I know what to do next

Wait until an NDIS representative calls you and says it is time to set up a planning meeting.
The planning meeting is not to be done on the phone.

Need help?
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Planning meeting checklist

This list is designed to help you work through the preparation for your NDIS planning meeting. For each step, read the writing in the blue section for tips on how to complete the step. Once you have completed a step, tick the box and move to the next.

I have chosen when I would like my NDIS planning meeting

You can request any date that will suit you.
You are allowed to change the date if your situation changes.
You are allowed to ask for the planner's phone number to ring back with a time that suits you.

I have chosen who I would like to attend my NDIS planning meeting with me

You are able to bring anyone that you want to be involved in the planning meeting. This may include:

- A pre-planner.
- Your carer.
- Family members.

I have chosen where I would like to have my planning meeting

You can ask to have the meeting wherever suits you. This may be:

- In your home.
- At the office of your pre-planner.
- At a library.
- Anywhere that offers privacy and confidentiality.

I know what I can bring to my planning meeting, and when to ask for help

You need to take along this booklet.
You can ask for clarification of any question.
You can ask for your support person to attend by phone if they are unable to be there in person.

Need help?
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Glossary

A

Access request form: the form people fill out that helps NDIA identify if a person is eligible to become a participant.

Agency managed plan: funding is chosen to be managed by the NDIA. The NDIA will pay a support provider directly.

Assistive technology: assistive and adaptive devices that allow a person to perform a task that they would have otherwise been unable to do.

C

Carer: someone who provides personal care, support, and help to a person with a disability and is not contracted as a paid or voluntary worker. This person is often a family member or friend.

Community services: services and community groups which might include things like health or mental health services, schools or education services, community groups, sporting or hobbies, other government services.

Core supports: support that enables a participant to complete activities of daily living and enables them to work towards their goals and meet their objectives.

E

Early childhood partner: organisations that are experienced in early childhood intervention. Work with families with a child under 6 years with a disability or developmental delay to decide of support needs, access services and the NDIS when appropriate.

Early intervention: is accelerated access into the NDIS. The intention is to provide funding for early intervention supports which are likely to reduce the impact of a person's impairment on their functional capacity at the earliest possible stage. This intervention is also intended to benefit a person by reducing their future needs for supports.

Eligibility: if a person can become part of the NDIS or not. This is based on the access requirements and found on the access request form.

F

Financial intermediary: An NDIS registered organisation that holds a participant's NDIS funds to manage their budget, receive invoices, and make payments for the services they have received.

First plan: The first plan is the start of a lifelong relationship with the NDIS. Once a person has gained access to the NDIS they will work together to develop the first plan. The first plan will generally last for one year.

Formal supports: paid supports that a person uses to assist with daily life activities, help them engage in the community and reach their goals.

Funded supports: the funding available to a participant under the NDIS. There are three budgets in a support package: core, capacity building and capital.

G

Goals: things a participant of the NDIS wishes they could do or achieve in the future, with the help of the NDIS.

Guardian: a person in a formal caring role, acting for a person with a disability. Parents are usually guardians.

I

Informal supports: the care and help you get from your family and friends.

L

Local Area Coordinator (LAC): are local organisations working in partnership with the NDIA, to help participants, their families and carers access the NDIS. LACs will help gather information from participants to inform NDIA in preparation for plan writing. LACs do some basic management of plans and connect participants to mainstream services and local and community-based supports.

M

Mainstream supports: government systems providing services to the Australian public such as health, education, housing and employment. These are services available to the community that are not specifically disability services, but services for all, inclusive of those with a disability.

myplace participant portal: myplace is for participants or their nominee to view their NDIS plan, request payments and manage services with providers.

N

National Access Team: NDIA staff members who work in locations around Australia to review NDIS access applications and decisions relating to a participant's eligibility for the NDIS.

Glossary

National Disability Insurance Agency

[NDIA]: National Disability Insurance Agency. The Commonwealth government organisation administering the NDIS.

National Disability Insurance Scheme [NDIS]:

National Disability Insurance Scheme. A new way of providing support for Australians with disability, their families and carers.

Nominee: a person who is appointed to act and make decisions for a participant of the NDIS who does not have a parent or guardian.

O

Outcome domain: a breakdown of life domains to help with planning and measurement of outcomes in working towards goals. Includes: daily living, home, health and well-being, lifelong learning, work, social and community participation.

P

Participant: a person with a disability receiving an NDIS support package.

Participant pathway: steps participants will take on their journey with the NDIS.

Participant statement: information setting out a participant's living arrangements, relationships, supports, description of day to day life as well as their short and longer term goals.

Personal capacity building: making sure people with disability and their families have the skills, resources and confidence they need to participate in the community or access the same kind of opportunities or services as other people.

Plan: A written agreement worked out with the participant, stating their goals and needs, and the reasonable and necessary supports the NDIS will fund for them. Each participant has their own individual plan.

Plan management: the way a participant's funding is managed. This may be by the NDIA (agency), third party or self managed.

Provider managed plan: funding is managed by a third party. The NDIS will pay the financial intermediary directly for these supports.

Pre-planning: a voluntary process by which an NDIS participant works with a provider to identify their goals and support needs while translating into NDIS related terms to ensure the optimal NDIS plan is obtained.

Provider: a service providing support to a person with a disability paid for through an NDIS package.

R

Reasonable and necessary supports: are those that, assist a person to pursue their goals, aspirations and independence and allow a person to take part in social activities and work in the community.

Registered service provider: registered providers are individuals or organisations that are registered with the NDIA to deliver a support or a product to a participant in the NDIS.

S

Self managed plan: choosing and arranging your own supports, including your own support workers as well as managing the payments for supports and paying their providers directly.

Service agreement: a contract between the participant and the service provider they have chosen to deliver the supports in their participant plan.

Service booking: a service booking is the way a participant engages with their chosen provider(s) online via myplace participant portal. A service booking nominates the type of support, dates of support, and funding to be allocated to a provider when self managing.

Short term accommodation: respite support.

Specialist support coordination: specialist support coordination where there is a more complex situation.

Support category: 15 categories used within plan budgets. Including: assistance in daily life, transport, consumables, assistance with social and community participation, assistive technology, home, coordination of supports, improved living arrangements, increased social and community participation, finding and keeping a job, improved relationships, improved health and well-being, improved well-being, improved learning, improved life choices, improved daily living skills.

Support connection: short term assistance to identify service providers and negotiate service agreements.

Support coordination: related to case coordination. Connecting individuals with the services that will help them reach their goals. Longer term capacity building support to navigate the complexity of services and supports you need from a range of providers.



The next section is a summary section. You may ask a pre-planner to help you with this section, or you can leave it blank.

Pre-planning summary

Participant details

Name:

Date of birth:

Address:

Postcode:

Gender:

Marital status:

Plan nominee:

Relationship to participant:

Guardian:

Financial administrator:

Participant requires support coordination

Yes

No

Participant requires financial intermediary service

Yes

No

Participant requires support to seek appropriate accommodation

Yes

No

Participant requires supported independent living

Yes

No

Participant requires specialist disability accommodation

Yes

No

Pre-planning summary

Goals

Goal one:

Relates to:

Goal two:

Relates to:

Long term goal:

Relates to:

Long term goal:

Relates to:

Goal one

Core		Capital		Capacity	
Outcome domain	Support	Outcome domain	Support	Outcome domain	Support
Daily living	Assistance with daily living (1.01)	Daily living	Assistive technology (2.05)	Choice and control	Coordination of supports (3.07)
	Transport allowance (1.02)		Home modifications (2.06)		Improved life choices (3.14)
	Consumables (1.03)		Home		Improved living arrangements (3.08)
Social and community participation	Assistance with social and community participation (1.04)			Social and community participation	Improved social and community participation (3.09)
				Work	Finding and keeping a job (3.10)
				Relationships	Improved relationships (3.11)
				Health and well-being	Improved health and well-being (3.12)
				Lifelong learning	Improved learning (3.13)
				Daily living	Improved daily living skills (3.15)

Quotes or assessments required:

Why are these supports reasonable and necessary?

Goal two

Core Outcome domain	Core Support	Capital	Capital Support	Capacity	Capacity Support
Outcome domain	Support	Outcome domain	Support	Outcome domain	Support
Daily living	Assistance with daily living (1.01) <input type="checkbox"/>	Daily living	Assistive technology (2.05) <input type="checkbox"/>	Choice and control	Coordination of supports (3.07) <input type="checkbox"/>
	Transport allowance (1.02) <input type="checkbox"/>		Home modifications (2.06) <input type="checkbox"/>		Improved life choices (3.14) <input type="checkbox"/>
	Consumables (1.03) <input type="checkbox"/>			Home	Improved living arrangements (3.08) <input type="checkbox"/>
Social and community participation	Assistance with social and community participation (1.04) <input type="checkbox"/>			Social and community participation	Improved social and community participation (3.09) <input type="checkbox"/>
				Work	Finding and keeping a job (3.10) <input type="checkbox"/>
				Relationships	Improved relationships (3.11) <input type="checkbox"/>
				Health and well-being	Improved health and well-being (3.12) <input type="checkbox"/>
				Lifelong learning	Improved learning (3.13) <input type="checkbox"/>
				Daily living	Improved daily living skills (3.15) <input type="checkbox"/>

Quotes or assessments required:

Why are these supports reasonable and necessary?

Long term goal

Core		Capital		Capacity	
Outcome domain	Support	Outcome domain	Support	Outcome domain	Support
Daily living	Assistance with daily living (1.01)	Daily living	Assistive technology (2.05)	Choice and control	Coordination of supports (3.07)
	Transport allowance (1.02)		Home modifications (2.06)		Improved life choices (3.14)
	Consumables (1.03)		Home		Improved living arrangements (3.08)
Social and community participation	Assistance with social and community participation (1.04)			Social and community participation	Improved social and community participation (3.09)
				Work	Finding and keeping a job (3.10)
				Relationships	Improved relationships (3.11)
				Health and well-being	Improved health and well-being (3.12)
				Lifelong learning	Improved learning (3.13)
				Daily living	Improved daily living skills (3.15)

Quotes or assessments required:

Why are these supports reasonable and necessary?

Long term goal

Core		Capital		Capacity	
Outcome domain	Support	Outcome domain	Support	Outcome domain	Support
Daily living	Assistance with daily living (1.01)	Daily living	Assistive technology (2.05)	Choice and control	Coordination of supports (3.07)
	Transport allowance (1.02)		Home modifications (2.06)		Improved life choices (3.14)
	Consumables (1.03)		Home		Improved living arrangements (3.08)
Social and community participation	Assistance with social and community participation (1.04)			Social and community participation	Improved social and community participation (3.09)
				Work	Finding and keeping a job (3.10)
				Relationships	Improved relationships (3.11)
				Health and well-being	Improved health and well-being (3.12)
				Lifelong learning	Improved learning (3.13)
				Daily living	Improved daily living skills (3.15)

Quotes or assessments required:

Why are these supports reasonable and necessary?



[linkedin.com/company/synapse-
formerly-brain-injury-association-qld](https://www.linkedin.com/company/synapse-formerly-brain-injury-association-qld)



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Get in touch

07 3137 7400
Freecall: 1800 673 074
(outside Brisbane)
07 3137 7452
info@synapse.org.au

Queensland

Level 1, 262 Montague Rd
West End QLD 4101
PO Box 3356
South Brisbane QLD 4101

New South Wales

Suite 102/Level 1
3 Carlingford Road
Epping NSW 2121

[synapse.org.au](https://www.synapse.org.au)