

## How to get the most out of your NDIS plan

- How to use a plan appropriately
- What to do when your plan comes back and it doesn't meet your needs
- What do 'choice and control' and 'plan flexibility' really mean?
- What represents a 'change in situation' and how to submit it
- What to do if you run out of funding while waiting for a change of situation decision

Presenting tonight:

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## Acknowledgement of Country

I would like to begin today by acknowledging the Traditional Custodians of the land on which we meet today, and pay my respects to their Elders past, present and emerging. I extend that respect to Aboriginal and Torres Strait Islander peoples here today.



## How to use your NDIS plan appropriately:

When a participant receives their NDIS plan it can be confusing to understand; what category can be used for what, where is it flexible and where isn't it. What does the phrase 'choice and control' mean and what to do if the plan is not built in a way that works for the person.

Today I am going to go through and explain further to hopefully build your understanding and help with utilisation so you can get the most out of your plan.



## Key things about an NDIS plan

Some key things to be aware of when reading your NDIS plan:

- Your NDIS plan will be broken down into 3 sections: About Me; My Goals and My Supports.
- The about me section is based off the information you provided the LAC or planner in your meeting, they may not have it exactly correct but this does not impact your funding. If you are very bothered by this though you can request it to be changed.
- The goals are important as they relate to legislation section 34. When you utilise your funding it needs to be in line with reasonable and necessary, and one of the reasonable and necessary points is that the support being funded links to the NDIS goals (one or more).
- The supports in informal, mainstream and community supports section of the plan are supports that are NOT NDIS funded supports, so they won't be included.



## Key things about an NDIS plan - CORE

- There are three categories of supports that you may have funded in your NDIS plan: **Core** Supports; **Capacity Building** Supports and **Capital** Supports.
- The CORE budget has always been the most flexible however not all parts of CORE is flexible unless there is funding in that subcategory. It also isn't flexible within subcategories if different parts of the CORE budget is managed differently, ie: If your consumables budget is self managed but your social community and civic participation budget is plan managed there isn't flexibility within the two subcategories of CORE.
- Under Transport there is the option for periodic payments ( this is when the funding goes into a bank account ) this needs to be set up on the NDIS portal under bank details and the BSB and acc number on there is the one this money will go into.





## Key things about an NDIS plan – CAPACITY BUILDING

- There are many subcategories under Capacity Building and unlike Core it isn't flexible between the subcategories and it is important to stick to the supports that can be funded under each for that subcategory.
- In Capacity Building especially under Improved Relationships or Support Coordination subcategories but you can see in the others as well that it may say STATED next to the funding and that is to highlight that you can only use that budget for that service. For example under Improved Relationships if it says STATED it can only be used for a behaviour support clinician.
- Check each of the categories and how they are managed whether Self, Plan or NDIA managed. If it isn't how you have requested you can ask this to be adjusted.



## Key things about an NDIS plan - CAPITAL

- Under the Capital budget you can sometimes see equipment listed and next to it will say 'quote required' and also may say STATED. This means that it has had approval for the equipment however they need a quote for the exact amount of the piece of equipment that is needed before releasing the funding and having that purchased.
- Mid cost AT is fairly new and has been introduced to make it easier for people to purchase items.
- Mid and high cost AT is funded through Capital budget, Low cost AT is funded through Consumables in CORE.
- Home modifications and SDA are also funded under the Capital budget.



## How to use the funding appropriately

- Having a comprehensive implementation meeting with an LAC, Planner or Support Coordinator is helpful to understand the funding that has been built into the plan you have received.
- You can request that they write an email following up with the information they have explained as it can be confusing.
- If plan managed and you don't have a support coordinator and you're unsure about if something can be funded, then you can ask the plan manager.
- It is important to have a good understanding of reasonable and necessary and what each point mean as it gives you the guidelines you need when thinking about whether a support can be funded using the plan.
- A support that is funded in one persons plan does not mean every person can use that same support, the plans are made for that individual.





## Reasonable and necessary

Let's run through reasonable and necessary.

The NDIS funds a range of supports and services which may include education, employment, social participation, independence, living arrangements and health and wellbeing.

In order to be considered reasonable and necessary, a support or service must be the following:



## Reasonable and necessary

- must be related to a participant's disability
- must not include day-to-day living costs not related to your disability support needs, such as groceries
- should represent value for money
- must be likely to be effective and work for the participant, and
- should take into account support given to you by other government services, your family, carers, networks and the community.
- take into account any informal supports already available to the individual (informal arrangements that are part of family life or natural connections with friends and community services) as well as other formal supports, such as health and education.

These supports will help participants to:

- pursue their goals, objectives and aspirations
- increase their independence
- increase community and workplace participation, and
- develop their capacity to actively take part in the community.



## Price guide and price catalogue

- The price guide and price catalogue can be helpful to look at if you are trying to understand the different item codes and what that support includes.
- If you are wanting to utilise your plan to purchase a piece of equipment and are unsure whether it will be approved, I recommend if plan managed that you speak with them first. Equipment (low and mid cost) require a recommendation letter from an allied health professional and the plan manager will request this with the invoice or receipt. If self-managed, I recommend getting a recommendation letter in case you are audited as this is best practice and what the NDIA request.



## Choice and control

**Choice and Control** is a cornerstone of the NDIS, reflecting the principle that people with disabilities should have the autonomy to make decisions about their own lives and the supports they receive. Here's what it entails:

### Decision-Making Authority:

- **Participants' Preferences:** Individuals can choose the types of supports and services that best meet their needs and goals.
- **Service Providers:** Participants can select which service providers they want to work with, fostering competition and quality improvement among providers.

### Personalisation of Supports:

- **Tailored Plans:** Each NDIS plan is individualised based on the participant's specific circumstances, preferences, and aspirations.
- **Goals and Outcomes:** Participants set their own goals, and the supports are designed to help them achieve these outcomes, whether they relate to independence, community involvement, education, or employment.



## Choice and control

### Budget Management:

- **Self-Management:** Participants can manage their NDIS funding directly, giving them greater control over how funds are spent and allowing for more personalised purchasing of supports.
- **Plan Management:** Alternatively, participants can choose to have their funds managed by a registered plan manager or by the National Disability Insurance Agency (NDIA).

### Empowerment and Independence:

- **Informed Choices:** The NDIS supports participants in making informed choices through the provision of relevant information and resources.
- **Skill Development:** Participants are encouraged to develop skills to manage their own supports and navigate the system effectively.





## Plan flexibility and choice and control

*As I have explained the NDIA really try and work towards a person having as much choice and control and plan flexibility in their plans, and through the process giving them more autonomy over their funding and supports.*

There are still limitations that we need to understand though:

- The NDIA is an agency running an insurance scheme so we always need to have strong and comprehensive evidence backing up the funding requests.
- The NDIA are bound by legislation so when a plan is built and utilised we need to adhere to the legislation and ensure we are always in line with the rules set out to ensure the funding is being utilised correctly.
- Plan flexibility and choice and control does not mean just using the plan however we want and then when we run out the NDIA give more and more. We need to respect the budget and work within the guidelines at all time.
- If we find there is overspend happening then we need to re budget or re assess the situation and if there is overspend due to the situation changing then we need to put together the evidence to request a reassessment of the plan through a change in situation.



## When a plan comes back:

- When you receive your NDIS plan you have the option to review the decision made by the agency. You have the option to do this within 90 days of the plan being approved. It is important to obtain further evidence to show why you disagree with the outcome and what needs to be reviewed. You can do this by calling the LAC or the NDIA ( 1800800110 ) or emailing [enquiries@ndis.gov.au](mailto:enquiries@ndis.gov.au) with the form that is found on the NDIS website.
- Outside of the 90 days you have the option to request a reassessment through a change in situation. You can do this by calling your LAC or the NDIA ( 1800800110) or emailing [enquiries@ndis.gov.au](mailto:enquiries@ndis.gov.au) with the form that is found on the NDIS website. It is important you have strong evidence to back up the request.



## Change in situation

The NDIA always need to hear about the changes to your circumstances including:

- your contact details, such as your address, phone number or email
- the support your family and friends provide
- if there are changes to the functional impact of your disability, meaning you might need more or less support
- you're starting a new job and need new or different support at work
- you're going overseas for a long period of time, or you're moving overseas
- you're moving out of residential accommodation or aged care, and you need different support in your new home
- you receive or claim compensation for an accident or illness related to your disability.

However it is when you need something changed in your plan that you want to submit the change in situation form with evidence backing up the change and why the plan is not sufficient.

- You have the option in the form to request a plan variation or a plan reassessment. A plan variation is 1 or 2 small changes to the plan and a plan reassessment is reviewing the entire plan.



## Change in situation continued

I find that a lot of people will say “my situation has changed, I need to submit a change in situation and get a new plan.” This is not necessarily the case and it is important to understand:

- If there is a change to your situation, you can notify the NDIA but don't need to change your plan.
- Putting in a request for more funding doesn't necessarily mean you will receive more funding.
- It is important to think about what do you need changed and can your current funding be used in a way to make it work.
- Have you utilised mainstream and community supports as NDIS is not a one stop shop and they will want to know that mainstream and community are doing all they can and it is in fact NDIS's responsibility to fund additional support for the person and there is clear evidence to back it up.



## Change in situation continued

- Due to the changes with PACE at the NDIA, there are massive delays at the agency which means when people are putting in a change in situation they are waiting 3-6 months for an outcome.
- If you need to submit a change in situation through enquiries it is worth calling after a few days to make sure they have received and are processing.
- After 21 business days or if you are at high risk or have less than \$1000 in the budget you can call and escalate or make a complaint to the NDIA explaining your situation.
- For high risk cases they are putting in interim plans while people are waiting an outcome so people are not running out of funding while waiting due to the long wait periods.





## Review time

*If you have not needed a change in situation and your plan is coming up for review, there have been a few changes, so you can expect:*

1. 3 months prior to the expiry of your NDIS plan you will receive a phone call or letter saying your plan is coming up for review. They will say in this phone call or letter what you are eligible for and there are 3 options ( plan roll over this is the same plan again for 12 months, plan variation which is 1 or 2 small changes or a plan reassessment which is reassessing the entire plan).
2. You can contact or respond with what you would like to happen ( a roll over, plan variation or plan reassessment ). Noting that a plan variation and plan reassessment does require evidence so reports and quotes are required.

**\*\*** Please note that if there has been a change, the plan has not been working or there is a transition coming up a plan variation or plan reassessment is likely needed so getting reports and quotes are important to think about. If the plan has been rolled over once they won't usually say you are eligible for another roll over and will need reports and to have a meeting but you can request the same plan again you just need to have reports to back it up.



Questions?

