



# Using your NDIS plan

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## Booklet

# 3

### This booklet covers:

- understanding what's in your plan
- learning how to use your plan
- choosing and managing supports and services
- reviewing your plan and progress.



# Please note: **COVID-19**

## **The NDIA has made some changes to the way we do things during the COVID-19 pandemic.**

Some of the things in this booklet might be slightly different to how you might experience your NDIS journey now.

Some of the changes we have made include:

- You can get the access request form, and supporting evidence form online - so you do not have to go to your local NDIS office to apply.
- Your meetings with your Local Area Coordinator, early childhood partner or the NDIA will be held over the phone where possible. This includes planning and plan review meetings.
- The NDIA will contact you by phone to undertake your plan review and will discuss the option of having your plan in place for 24 months.
- You don't need to do anything if your plan is going to expire, it will be automatically extended for 12 months if we haven't been able to complete a plan review.
- Your plan is now more flexible. We have broadened our approach for low cost AT items and there's new line items added for supported independent living.

# How to use this booklet

This booklet will help you at different stages of using your NDIS plan.

It can help you understand what a National Disability Insurance Scheme (NDIS) plan is and how to use funding, arrange supports and services, and work towards your goals. It will also help you review your goals and prepare for your plan to be reviewed.

Use this booklet when you talk with your early childhood partner, Local Area Coordinator (LAC), Support Coordinator or the National Disability Insurance Agency (NDIA) about your NDIS plan and how you progress towards your goals. You can note things that need to be put in place or are working well in your plan and what things might need to change.

You can use this booklet to record your questions, notes and ideas.

**NDIS key words:** Some words we use to talk about the NDIS might be new to you, so we explain them along the way. These words are in **purple** text.

**Examples:** In this book examples are written in **red** text and start with the words 'For example'.

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This is the third and final booklet in the series. We recommend you keep the three booklets together for easy reference.

## Booklet 1: Understanding the NDIS

- Understanding the NDIS
- Applying for the NDIS
- Supports and services funded by the NDIS

## Booklet 2: Planning

- Understanding your current supports
- Creating an NDIS plan to pursue your goals
- Receiving an approved NDIS plan

## Booklet 3: Using your NDIS plan

### Understanding what's in your plan

- Learn what the different parts of your NDIS plan mean, how it has been put together, who can help you start using your plan and how your plan is managed

### Learning how to use your plan

- Learn how to start using your plan to pursue your goals
- Understand what you can spend your funding on and how to find service providers. Your plan will also tell you how you can access community and other government services outside the NDIS

### Choosing and managing supports and services

- Use this booklet when you are choosing providers to deliver your supports and services
- Find out what to do if things aren't working out or you want to try another provider

### Reviewing your plan and progress

- Use this booklet to help keep track of your goals

These booklets are available in different formats and in [other languages](#).

Visit [ndis.gov.au](https://www.ndis.gov.au) or call **1800 800 110** to request a copy.

# Understanding what's in your NDIS plan

**My NDIS number:**

**My plan start date:**     /     /

**The duration of my plan:** **For example, my plan is for 24 months**

## Who can help you to start your plan?

Depending on your situation and support needs, you will receive help to start your plan with one of the coordinators below. You may have already been in contact with these Partners in the Community, at your original planning meeting.

### Early childhood partner

For families and carers of children younger than 7.

### Local Area Coordinator (LAC)

For NDIS participants aged 7 and over.

Early childhood partner and LACs come from organisations in your local community and work with the NDIA to deliver the NDIS. Visit [ndis.gov.au](https://www.ndis.gov.au) to find an early childhood partner and Local Area Coordination Partner in your area.

If early childhood partners or LACs are not available in your area, the NDIA will help you connect to the NDIS and services or to supports in the community.

### Support Coordinator

If you need more help coordinating your supports, the NDIA may fund a Support Coordinator. A Support Coordinator can help implement your plan and build your ability to connect with supports and services. Your NDIA Planner may also consider a Support Coordinator if your situation is more complex or you have specific goals you need help coordinating your supports and services to. Visit [ndis.gov.au](https://www.ndis.gov.au) for more information on Support Coordination.

For more information on these roles, see [Booklet 1 – Understanding the NDIS](#) on the NDIS website.

After your plan has been approved you might want to meet with the NDIS for an implementation meeting.

We aim to hold this meeting in **28 days** or less, to help ensure you can start to access supports when you need them.

This is our commitment to ensure we are **responsive** to individual needs and circumstances.

“The NDIS has helped me to be more independent, by supporting me with modifications to my new house and helping me get back to driving a car. Driving a car has been huge for me. Also, they’ve helped get me back to the gym, which will lead to the ultimate goal of being able to walk a lot more and not have to rely on the chair as much as what I do.”

**Roy, NDIS participant**



## How your early childhood partner, LAC or Support Coordinator can help you use your plan

Your early childhood partner, LAC or Support Coordinator can help you:

- understand your plan and what supports and services you can pay for with your NDIS funding
- learn what is the responsibility of other services, such as the health or education systems, or your state or territory government
- connect with community and other government services
- find providers who meet your needs and help you pursue your goals
- learn about making service bookings or service agreements with your providers
- if you have questions, concerns or something in your life changes.

### Your early childhood partner, LAC or Support Coordinator's contact details

Name:

Phone number:

Email address:

Office address:

### Viewing your plan

Your plan will be available on the NDIS myplace portal about 24 hours after it has been approved. You will also receive a printed copy of your plan either in person or in the mail in your preferred format or language.

### What is myplace?

The myplace portal is a secure website portal on the Australian Government's myGov website where you, or a person you trust (a nominee or third party decision maker), can access your NDIS information. If you already have a myGov account for other government services, such as Medicare, the Australian Taxation Office or Centrelink, you can use the same myGov account for the NDIS.

You will be given an activation code to use the first time you access the myplace portal. It is important that you access myplace as soon as possible after you receive your activation code, as the code will expire after 10 days.

If you need an activation code, or your activation code has expired, you can get another one by calling the NDIA on **1800 800 110** or contacting your early childhood partner, LAC or Support Coordinator.

#### What can you do on myplace?

- See your current plan and previous plans
- Check your contact details
- See messages from the NDIS
- Create and view payment requests
- Create and manage service bookings
- Upload documents, including assessments
- Share your plan, or parts of your plan, with your service providers
- Find service providers

For detailed instructions about using myplace, refer to the **NDIS myplace participant portal: Step-by-step guide** at [ndis.gov.au](https://www.ndis.gov.au).

## What's in your plan?

Your NDIS plan will be based on the discussion you had in your planning meeting. Your plan will include the following information:

### Information about you

This section includes basic information about your disability, your day-to-day activities, where you live, who you live with, or who cares for you, and any aids and equipment (assistive technology) you may have.

### Family and friends

This section includes information about the support you get from family and friends that is not funded but will help you work toward your goals.

### Services and community groups

This section includes information about services and supports funded and delivered by community or other government services, like support groups, health centres, libraries and public transport.

### Your goals

This section includes the current goals you would like to pursue as part of your plan and the long-term goals you have identified for your life. Goal-setting is an important part of the NDIS. Each of your supports and services should be helping you pursue the goals you have in your NDIS plan.

### Funded supports

This section tells you what funding you have been allocated across our three **support budgets**. Within each support budget there is a number of **support categories**. You may not have all the support categories funded in your plan. Some people might have one or two support categories funded and others may have more. This will depend on your individual needs and may change from plan to plan based on the supports and services you need.

Your funding is based on what is **reasonable and necessary**, in addition to the support provided by family, friends and other community and government services you need to live your life and pursue your goals. You must only use your NDIS funding on supports and services that are directly related to your disability and will help you to pursue the goals in your NDIS plan.

More information about the type of supports the NDIS may fund is available in the [NDIS Pricing Arrangements and Price Limits](#) at [ndis.gov.au](https://www.ndis.gov.au).

## NDIS key words:

### Support budgets

NDIS plans contain three support budgets: Core Supports, Capital Supports and Capacity Building Supports. These budgets align with a range of support categories. See more details in the next section of this booklet.

### Support categories

Supports and services for participants are listed across 15 support categories, including: assistance with daily life, transport, consumables, assistance with social and community participation, assistive technology, home modifications, coordination of supports, improved living arrangements, increased living social and community participation, finding and keeping a job, improved relationships, improved health and wellbeing, improved learning, improved life choices, and improved daily living.

### Reasonable and necessary

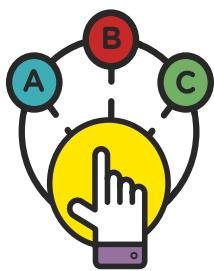
'Reasonable' means something fair and 'necessary' means something a person needs. The NDIS funds supports and services that relate to a person's disability to help them pursue their goals and meet their needs.

“One of my main supports is my occupational therapist. That's where I try to achieve my goals to become more independent and get jobs and stuff like that. Then I also have my speech pathologist to learn how to communicate more clearly and keep the conversation going.”

**Kira, NDIS participant**



# Support budgets



There are three types of support budgets that may be funded in your NDIS plan:

- Core Supports budget
- Capacity Building Supports budget
- Capital Supports budget

## Core Supports budget

Core Supports help you with everyday activities, your current disability-related needs and to work towards your goals. Your Core Supports budget is the most flexible, and, in most cases, you can use your funding across any of the following four support categories:

In your plan	In the myplace portal	Description
Assistance with daily life	Daily activities	For example, assistance with showering, dressing, household cleaning and/or yard maintenance.
Consumables	Consumables	Everyday items you may need. For example, continence products or low-cost assistive technology such as modified cutlery and hand rails to improve your independence and/or mobility. You may also use these funds to do minor repairs to aids and equipment (assistive technology) for example wheelchair tyre puncture repair.
Assistance with social & community participation	Social, community and civic participation	For example, a support worker to help you to participate in social and community activities.
Transport	Transport	<p>This is support that helps you travel to work or other places that will help you pursue the goals in your plan where you are unable to travel by yourself or use public transport.</p> <p>How you can spend your transport funding, including by arrangement with your provider, and how it is paid to you (whether upfront or in regular payments) will be different for each person.</p> <p>Your early childhood partner, LAC, NDIA Planner or Support Coordinator will explain how you can use this budget.</p>

## Case Study

### Charlotte

**Charlotte's goals are to learn to be more independent in her daily life and to make friends. She has funding in her Core Supports budget to help her with tasks like getting dressed and cooking meals.**

Over time, Charlotte feels confident reducing the amount of support she needs in the morning to get dressed and make breakfast. Because Charlotte's Core Supports budget is flexible, she decides to reduce the amount of one-on-one support she receives in the morning and uses the funding for a support worker to take her to a weekly sporting activity.

## Capital Supports budget

Capital Supports include higher-cost pieces of assistive technology, home or vehicle modifications and funding for one-off purchases you may need (including Specialist Disability Accommodation).

It is important to remember that funds within the Capital Supports budget can only be used for their specific purpose and cannot be used to pay for anything else. The Capital Supports budget has two support categories:

In your plan	In the myplace portal	Description
<b>Assistive Technology</b>	<b>Assistive Technology</b>	This includes equipment for mobility, personal care, communication and recreational inclusion such as communication devices, wheelchairs or vehicle modifications.
<b>Home Modifications</b>	<b>Home Modifications</b>	Home modifications such as the installation of an accessible shower, or Specialist Disability Accommodation.

## Capacity Building Supports budget

Capacity Building Supports help build your independence and skills to help you pursue your goals.

Unlike your Core Supports budget, your Capacity Building Support budget cannot be moved from one support category to another. Funding can only be used to purchase approved individual supports within that specific capacity building (CB) category. The Capacity Building Support categories are:

In your plan	In the myplace portal	Description
<b>Support coordination</b>	<b>Support coordination</b>	This is a fixed amount for a Support Coordinator to help you use your plan and engage with providers.
<b>Improved living arrangements</b>	<b>CB home living</b>	Support to help you find and maintain an appropriate place to live.
<b>Increased social &amp; community participation</b>	<b>CB social community and civic participation</b>	Development and training to increase your skills so you can participate in community, social and recreational activities.
<b>Finding &amp; keeping a job</b>	<b>CB employment</b>	This may include employment-related support, training and assessments that help you find and keep a job, such as the School Leaver Employment Supports (SLES).
<b>Improved relationships</b>	<b>CB relationships</b>	This support will help you develop positive behaviours and interact with others.
<b>Improved health &amp; wellbeing</b>	<b>CB health and wellbeing</b>	This may include exercise or diet advice to manage the impact of your disability.
<b>Improved learning</b>	<b>CB lifelong learning</b>	Examples include training, advice and help for you to move from school to further education, such as university or TAFE.
<b>Improved life choices</b>	<b>CB choice and control</b>	Plan management to help you manage your plan, funding and paying for services.
<b>Improved daily living</b>	<b>CB daily activity</b>	Assessment, training or therapy to help increase your skills, independence and community participation. These services can be delivered in groups or individually.



## Other information in your plan

### Stated supports – not flexible

Some supports in your plan may be included as stated supports. Any support listed as ‘stated supports’ is not flexible. This means funding has been allocated for a specific service, or product and you can’t use this funding for something else.

### In-kind supports – pre-paid

If there are supports in your plan that are listed as ‘in-kind’, it means the service has already been paid for by your state, territory or the Australian government. You must use this provider as they have already received payment and will provide all services that are booked. This means you cannot choose a provider for that service, however if you have a concern about using a specific in-kind provider, you are encouraged to raise your concerns with your early childhood partner, LAC or NDIA Planner.

In-kind supports will be phased out and you will have choice and control over the providers you use.

### Quote required

Where a support is listed as ‘quote required’, additional information such as quotes and/or specialist reports will be required before funding can be made available in your plan.

## Language interpreting supports (non-disability related)

Non-disability related interpreting supports are for getting help with interpreting a language other than English. Disability related interpreting includes hearing and visual supports.

Language supports for participants and carers, where English is not the preferred language, are not funded in an NDIS plan. Your registered NDIS provider will book a face-to-face or over the phone language interpreter on your behalf, to help you to use the supports in your plan.

## If you disagree with what’s in your plan

If you disagree or are unhappy with the goals in your plan, these can be changed at any time. Your early childhood partner, LAC or NDIA Planner will help you change them immediately. You can find more information about our review process and timeframes in the Participant Service Charter at [ndis.gov.au](https://www.ndis.gov.au).

Decisions that are made about supports in your NDIS plan are always made using the reasonable and necessary criteria from the *National Disability Insurance Scheme Act 2013*. To find more information about NDIS Legislation visit [ndis.gov.au](https://www.ndis.gov.au).

If you think an NDIA decision is wrong, you can request an **internal review** of a decision.

There is a list of ‘reviewable decisions’ in the NDIA Act. If the NDIA makes a decision from this list, you can request an internal review of that decision. Many decisions the NDIA makes are reviewable.

Examples include (but are not limited to):

- whether a person is eligible to access the Scheme
- the supports a person receives under the Scheme
- whether a participant’s NDIS plan is reviewed
- withdrawal of access to the Scheme.

Your early childhood partner, LAC or the NDIA can explain how to do this and can put you in touch with advocates who can help you with this process. A request for an internal review can only be made within three months of receiving the decision you would like reviewed. For example your plan or a letter declining your request to change your plan.

### NDIS key word:

#### Internal review

This is a review of a decision by the NDIA. The NDIA staff member who works on the internal review will not have been involved in the earlier decision. They may want to talk to you directly as part of this process.

If you didn't get funding for something you asked for, it is because the decision maker couldn't see that it met all of these six criteria:

- it would help you pursue your goals
- it would enable you to do activities to benefit your social and economic participation
- is value for money
- it would be effective and beneficial to you
- it cannot reasonably be provided by friends or family
- it cannot be provided by another government department or service.

**When completing an application for an internal review, you are asked to provide evidence about why the support you're requesting meets these six criteria. To help you do this, you can provide supporting documents with your application. These documents could be from people such as a doctor, psychologist or occupational therapist. They can help explain why the support is reasonable and necessary for you.**

When the NDIA reviews a participant's plan we will look at all the funded supports in the plan. This helps to make sure there are no gaps in the plan. If you have asked for a review, you can continue to use your plan while you wait for the decision.

If you're not happy with the internal review, you can apply for an external review by the Administrative Appeals Tribunal (AAT), not a part of the NDIA. You can't ask the AAT to review a decision by the NDIA before there has been an internal review by the NDIA.

## Managing your NDIS funding

During your planning conversation, you will have talked about how you want to manage the funding in your plan to pay for supports and services. Refer to [Booklet 2 - Planning](#) for an overview of the different ways your funds can be managed. If you can't remember how your plan is managed, you will find it listed on your plan. You can also ask your LAC, early childhood partner, Support Coordinator or the NDIA.

**There are four different ways to manage your plan:**

- 1. Self-management** – The NDIA will pay you so you can pay your providers directly. To find out more about self-management see the Guide to Self Management on the NDIS website [ndis.gov.au](https://www.ndis.gov.au).
- 2. Plan-management** – The NDIA will provide funding in your plan to pay for a Plan Manager who pays providers on your behalf.
- 3. NDIA-managed** – The NDIA will pay your providers on your behalf.
- 4. A combination** of the above options.

Now you have your plan, you may have more questions about how funding management options work or you might want to change your plan management approach. Your early childhood partner, LAC, Support Coordinator or the NDIA can answer your questions, help you if there are any problems or work with you if you would like to change how your plan is managed.

Remember, no matter how your funds are managed, you still have choice and control to ensure your services are working for you and fit in your budget. Even if your funding is managed by the NDIA or a Plan Manager, you should regularly check the myplace portal and your funding to make sure your budgets are on track.

“I am much happier at home, I am practising talking and walking, I am optimistic everything will fall into place. I like having the choice to do what I want when I want; I want to be independent, to have my old life back again.”

**Kirby, NDIS Participant**



# Using your plan

## What can you spend your funding on?

Consider the following things when deciding what to buy with your NDIS funding:

Question	Yes/No
1. Will the support or service help you to pursue the goals in your NDIS plan?	
2. Is the cost of the support or service reasonably priced and is it the best value for money compared to other supports?	
3. Can you afford the support or service within your approved NDIS budget? Remember, your funding needs to last the entire period of your plan.	
4. Will the support or service help you find or keep your job, help with your education, improve how you connect to your local community and improve the relationships you have with family and friends? It should not replace supports that would usually be provided by family, friends and within your community.	
5. Is the support or service something that should be funded by other government services instead? For example, dental, health or hospital services, education, housing and public transport. Note: the NDIS will fund some supports, such as disability-related health services, where they are part of the participant's daily life and result directly from the participant's disability. Remember, all communities should have facilities and activities that are inclusive and accessible to people with disability.	
6. Will the support or service help you to participate in activities with friends and other members of your community, or help you to find or keep a job?	
7. Is it safe? Your supports and services should not cause you any harm or put other people at risk.	

## Who can you buy services from?

You have choice and control about what supports and services you need to pursue your goals, where and when they are provided and by whom. Some participants ask family or friends to help them make these decisions, while others may ask their early childhood partner, LAC or Support Coordinator for help.

## What is a service provider?

A service provider is a person, business or organisation that delivers funded services. Service providers have different areas of experience and expertise so it's important to work out what you want and find the right providers for you. Providers can include large companies, charities, small not-for-profits, sole traders, or any other type of business.

Providers that are registered with the NDIS Quality and Safeguards Commission are called 'NDIS registered providers' and meet government quality and safety standards. To find out more about the independent commission visit [ndiscommission.gov.au](http://ndiscommission.gov.au).

If your NDIS funding is NDIA-managed you can only use NDIS registered providers to deliver your services. If you have been working with a support worker or provider for a number of years who is not an NDIS registered provider, encourage them to register so you can continue to work with them using your NDIS funding.

Participants whose NDIS funds are self-managed or managed by a Plan Manager can use NDIS registered providers and non-registered providers.

## Choosing and managing your services

### How do you find service providers?

Once you've identified the types of services that may help you pursue your goals, it's time to find out more about the providers in your area and whether they are right for you. Your early childhood partner, LAC or Support Coordinator can also help you. To find NDIS registered providers you can search the Provider Finder on the myplace portal or on the NDIS website.

You might want to research providers on the internet, check reviews, get advice from friends or family and speak with different providers either face-to-face or over the phone before you agree to work with them.

### If you can't find any service providers in your area

Your early childhood partner, LAC or Support Coordinator may be able to help if you are having difficulty finding service providers in your area. If there are not many service providers where you live, you can think about other people or businesses in your area that might be able to support you.

### How do you choose providers to deliver your services?

You may have already used some service providers before you joined the NDIS and you may choose to work with them again. You may also want to try new providers when you become an NDIS participant, or change to a new provider after you have had some time with an NDIS plan.

When considering a service provider, talk to them about your goals and discuss how they can help you work towards them.

Here are some questions you may ask:

- Are you an NDIS registered provider?
- How will you help me pursue my goals?
- How much does your service cost?
- Can I choose which staff will work with me?
- Can you provide the service at a time that suits me?
- How can I make a complaint or resolve a payment issue?

### Sharing your plan

You do not have to give anyone a copy of your NDIS plan. Sharing your plan is your choice.

You can choose to share parts or all of your plan with your service providers through the myplace portal. In particular, you may want to share information about you and your goals so they know what you want to pursue and how you would like them to help you.

All providers must comply with the *Privacy Act 1988* and must not share your personal information with anyone else without your permission.

If you have concerns about your privacy, speak to your provider about their privacy policy and rules.

### What if I have a concern about a provider?

If at any time you have a concern about your current NDIS supports or services, it is important that you talk about it. For more information about how to raise a concern or make a complaint visit [ndiscommission.gov.au](https://www.ndiscommission.gov.au)

“The best thing about the NDIS for me is the difference that it allows me to make in the life of a child, and their family.”

**Joanna Buttfeld,**  
NDIS registered provider



## Finding the right provider for you

Use the space below to note the providers who you might like to work with.

My goal	Support needed	What are you looking for in a service provider?	Who could provide this service to you?
For example, I want to get a job when I finish school.	I want help to learn how to manage my time, build confidence and prepare applications and prepare for interviews.	Someone who has experience working with people like me. I would like to work with a provider that is easy to access from public transport.	ABC Recruitment

## Service agreements

A service agreement is an agreement between people or businesses when one party agrees to provide goods or services to the other. In the context of the NDIS, a service agreement is between you and your chosen provider. The NDIA is not a party to this agreement.

You should have a clear understanding of how the supports will be provided.

It is good practice, but not mandatory (with the exception of Specialist Disability Accommodation), to make a service agreement. The NDIA makes this recommendation so you and your providers are clear about what you have agreed.

A service agreement may outline what services will be provided by the provider, the roles and responsibilities of both parties, how to resolve any problems, and what happens if you or the provider wants to change or cancel the agreement.

Providers should support you to understand any service agreement using the language, mode of communication and terms you understand.

Service agreements should reflect what has been agreed to and all prices should be clear. Your provider may have their own standard service agreement you may like to use, or you can create your own.

You should be aware of your rights under Australian Consumer Law when creating a service agreement with a provider.

### Pricing

The NDIA currently sets some of the maximum prices that registered NDIS providers can charge for their services in the NDIS Pricing Arrangements and Price Limits. The NDIS Pricing Arrangements and Price Limits can be found at [ndis.gov.au](https://www.ndis.gov.au).

NDIS registered providers can charge less than the listed price but cannot charge more than the maximum price, except for self-managed participants who may choose to pay more. If you choose to pay more, you need to ensure you have enough funding in your budgets.

You can negotiate the price you will pay for a service with your provider and it should be agreed and it is good practice to have this recorded in a service agreement. The NDIA updates prices on 1 July each year and publishes them on at [ndis.gov.au](https://www.ndis.gov.au).

If you self-manage your NDIS funds, you can negotiate the cost of the agreed service with your providers.

For funds managed through the NDIA or a Plan Manager, NDIS registered providers cannot exceed the NDIS Pricing Arrangements and Price Limits.

## Case Study

### Ahmad

**Ahmad lives in a rural town and is using a Plan Manager to manage his NDIS funding. Ahmad requires support to get out of bed, shower and get ready for the day.**

There are no disability support organisations in his town, but Ahmad knows of a local woman, Brenda, who has her own business supporting elderly people. Although she is not an NDIS registered provider, Brenda has the right skills to help Ahmad and he feels comfortable with her. Ahmad and Brenda agree that she will be able to provide two hours of support to Ahmad each morning. Ahmad can do this because he has chosen to have his plan managed (plan-management).

Ahmad's Plan Manager creates a written service agreement with Brenda to outline the support Ahmad needs to achieve his goals, the hourly rate Ahmad will pay, when the service will be delivered, and the payment terms.

## Starting your supports and services

### Service bookings for NDIS registered providers

Once you have worked out the supports and services you need and have chosen who will provide them, the final step is setting up a service booking for your NDIS registered providers. This step isn't needed if you are using unregistered providers or self-managing funds.

Service bookings are used to set aside funding for an NDIS registered provider for a support or service they will deliver. Service bookings are not the same as service agreements. Providers claim payments against the service booking in the myplace portal. A service booking will show the type of support to be provided, the length of time it is needed, and sets aside funding from your budgets to pay for the support or service. Service bookings can be made by you, your nominee or third party decision maker or an NDIS registered provider, in the myplace portal.

**If your NDIS funds are self-managed** you don't need to use service bookings because you pay your providers directly.

**If your NDIS funds are plan-managed** your Plan Manager will create two service bookings on the myplace portal, one for their own service and another which allows them to claim payment from the NDIS for all services and supports in your plan. In this case, both NDIS registered and unregistered providers can be included in the service booking.

**If your NDIS funds are NDIA-managed** you will need to give your NDIS registered providers your NDIS number and the relevant support areas you have been funded for, so they can receive payment. You need to have service bookings in place so your provider can claim payment through the myplace portal. You or your provider can create service bookings.

### Changing a service booking

A service booking can only be changed on the myplace portal before the end date of the service booking.

### Cancelling a service booking

You can end a service booking on the myplace portal before the end date of the service booking. When the service booking is cancelled, any unspent money allocated for that service will be refunded back to your budget.

## Paying for your services

Services are paid through the myplace portal. The process is different depending on how your funding is managed.

### **If your NDIS funds are self-managed**

As a self-managed participant you have specific roles and responsibilities when you pay for your services. There are two options to pay your service providers using your NDIS funds:

1. Once you receive an invoice you can make a payment request via the myplace portal to transfer the money from your NDIS funding into a nominated bank account.
2. You can pay a service provider first and then make a payment request via the myplace portal to transfer the money from your NDIS funding into your nominated bank account so you are reimbursed.

You must keep records of your payments including invoices and receipts.

More information about paying for services as a self-managed participant can be found in the [NDIS Guide to Self-Management](#). The guide is available at [ndis.gov.au](https://www.ndis.gov.au) or by calling the NDIA on **1800 800 110**.

### **If your NDIS funds are plan managed**

Your Plan Manager will pay your services for you and will keep records of your payments. Your providers will need to invoice your Plan Manager for any services they deliver.

### **If your NDIS funds are NDIA-managed**

Your NDIS registered providers will claim payments through the service booking on the myplace portal. To do this, your provider will need your NDIS number, date of birth and surname.

## Keeping track of your plan

You should check often to see how much NDIS funding you have left. You can check on the myplace portal in 'My Support Budget' to see how much funding you have spent and how much you have left.

To ensure you know what you are spending your NDIS funding on, keep a record of the services you receive or ask your provider to give you copies of their service records on a regular basis. Remember, your funding will need to last for the entire period of your plan.

If you are self-managing your NDIS funding, you need to keep all the invoices and receipts as well as bank statements from your nominated bank account for five years. The NDIA can ask to check your records at any time so it is important to keep them organised so you can show you have spent your NDIS funds on supports that are helping you pursue the goals in your plan. Read more about your responsibilities as a self-manager in the [NDIS Guide to Self-Management](#) on the NDIS website at [ndis.gov.au](https://www.ndis.gov.au).

Service providers should not claim for services they have not provided. If this happens, contact your provider and try solving the issue with them directly. If you are unhappy with the outcome, contact your early childhood partner, LAC, Support Coordinator or the NDIA.

If you haven't used all your funding at the end of your plan, it will not:

- 'roll over' into your next plan
- be 'taken away' in your next plan.

Any changes to your future NDIS plans will be based on what is reasonable and necessary for your needs ongoing, taking into account the goals you have completed so far and how your skills and independence have improved.

### **What do I do if I'm unhappy with the support or service I'm receiving?**

If you're unhappy with the support or service you are receiving, you may wish to talk to your provider first. You can ask someone you trust, or an independent advocate, to help you talk to your provider.

If your issue is not resolved, you can contact the NDIS Quality and Safeguards Commission who are responsible for the regulation of providers in most states and territories. For more information about what the NDIS Commission can help you with, or to make a complaint about a provider, visit [ndiscommission.gov.au](https://www.ndiscommission.gov.au).

You can change providers if you're still unhappy, if you no longer require their services, or if there's another provider you'd prefer to work with.

In most cases when you change or stop working with a provider, you will need to agree when you will finish with them.

### **What happens if I can't find a registered provider?**

If you cannot find registered providers you can request an unscheduled plan review at any time.

### **What do I do if something changes during my plan?**

It is important to tell your early childhood partner, LAC, Support Coordinator or the NDIA about any big event or change in circumstances that may affect your plan, such as:

- changes to your disability related needs
- significant changes in your care or support provided by family or friends
- changes to your living arrangements such as where you live, if you live with new people, if you move overseas or into an aged care or residential facility
- being unable to find a registered provider to support your need
- changes to your job or that you're looking for a job
- receiving or claiming compensation for an accident or illness related to your disability.

A change of circumstances does not necessarily mean your plan will be reviewed or changed, however it's important to let your early childhood partner, LAC, Support Coordinator or the NDIA know about important changes in your life so that your plan meets your current needs.

If something does change that affects your needs or the supports in your plan, you need to complete a change of circumstances form, available at [ndis.gov.au](https://www.ndis.gov.au) or by calling the NDIA on **1800 800 110**.



# Reviewing your plan and goals

## Plan review for NDIS participants

Plan lengths vary depending on your circumstances. We will contact you before your plan ends to discuss a review of your plan.

The review of your plan will be conducted face-to-face or over the phone, depending on what you prefer. You can include a family member, friend, advocate, a nominee or third party decision maker, or another person in the review.

You should bring this booklet along with you to your plan review meeting.

## Plan review for children

The aim of early intervention is to reduce the impact of a person's disability or developmental delay on their daily life by providing support as early as possible. If your child receives early intervention support, their review will usually be with your child's early childhood partner.

Your child's access to the NDIS will be assessed at each plan review. The timing of their review will depend on your child's needs. This is to check that the early intervention supports are effective and supporting your child. If your child's development has improved and they have reached their goals, they may no longer need support from the NDIS.

## What do you need for your plan review meeting?

You may need to provide assessments or reports from some of your service providers for your plan review meeting. This is to show how your supports and services are helping you to pursue your goals. These reports can also make recommendations for supports and services you might need in the future. Your early childhood partner, LAC or the NDIA will discuss this with you.

## Reports I need to provide

**For example, progress report from my occupational therapist.**

## Preparing for your plan review

Reviewing your plan is an opportunity to check that your supports and services are helping you to pursue your goals. It's important that your NDIS plan and funding continue to work well for you and are adjusted as your life and goals change.

### Think about:

- What worked well in your plan?
- What didn't work well?
- Have you made progress towards achieving your goals?
- Which goals you need to continue to work on and which goals you need to change?
- Who can help you pursue your goals?
- Will you need NDIS support in the future?
- Would you like to change how all or some of your plan funding is managed?
- Any assistive technology that is ageing, needs replacement or is no longer suitable.

You do not need to pick new goals at each plan review, but your plan, supports and services should be helping you make progress, pursue new things and eventually achieve your long-term goals.

In preparation for your plan review, please bring along progress reports from your therapists or health professionals.

## Your plan may change over time

As described in [Booklet 1 – Understanding the NDIS](#), the NDIS is designed to increase your skills and independence so you can live a better life. As you work towards pursuing your goals, the amount of support you need will likely change.

If a service, early intervention support or assistive technology has increased your independence and decreased your need for additional support, you may need less funding, or no longer need any funding through an NDIS plan.

You may not need NDIS funding now, but you can contact us again in the future.

People who have an episodic disability (a disability where the impact on your day-to-day life fluctuates) may also see their NDIS funding levels change over time, just as their disability changes over time.

## Things to discuss in your plan review

### What worked well in your plan? What goals did you pursue?

**For example, I got support to do things around the house like the washing and help with having a shower.**

**I completed my work readiness training and now I'm ready to look for a job.**

## What didn't work as well?

For example, I feel I need more support to help find a job. Finding a job is a long-term goal in my plan. My provider keeps changing the staff member who supports me.

## What questions do you have about how your plan is managed? Would you like to change how you manage your funding?

For example, I think I could manage part of my plan, but not all of it. I'd like to discuss this at my next plan review.

## What are your new goals for your next plan?

For example, I want to become independent and eventually get back to work.

## Your notes and questions

For example, my son would like to start playing sport but I'm not sure what is going to be appropriate for him and his disability. What are the options in the area?

How do I share my plan with providers?

Any assistive technology that is aging or no longer suitable and needs replacement.

1

2

3

## What happens next?



- Use your plan and funding to progress towards your goals.



- Your LAC or early childhood partner will keep in touch with you regularly to make sure your plan is working for you.



- You will be contacted when it is time to review your plan again.

**Contact your early childhood partner, LAC or Support Coordinator if you have questions, if your circumstances change or if there is anything else you'd like to discuss.**

### For more information about this booklet, please contact:

#### National Disability Insurance Agency


 Telephone 1800 800 110

 Find us on Facebook/NDISAus

 Follow us on Twitter @NDIS

[ndis.gov.au](https://www.ndis.gov.au)

#### For people who need help with English

 TIS: 131 450

#### For people who are Deaf or hard of hearing

 TTY: 1800 555 677

 For Speak and Listen: 1800 555 727

 Internet relay: National Relay Service  
[relayservice.gov.au](https://relayservice.gov.au)